

# Arroyo Seco National Scenic Byway

## Market Research on Affiliated Sites and Visitors



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# Executive summary

This work supports an assessment conducted by the National Trust in November 2010. This market research provides rich data about current Byway visitors and the potential to attract new visitors. It also articulates a strategy and springboard for future marketing, and a baseline against which future Byway visitor assessments can be compared.

Most of the findings make intuitive sense:

- Visitor surveys at multiple sites confirm that most visitors to the Byway's sites come from Southern California, and Greater Los Angeles specifically. While some visitors were national or international, the primary and most accessible audience is nearby.
- Different types of people seek out different types of experiences, and the Byway's sites are different enough from each other that their visitor markets vary from site to site. The challenge is to create a Byway experience that is cohesive enough to appeal to an audience that can be quantified and targeted.

We used the Mosaic™ lifestyle segmentation system to cluster visitors to the various sites in ways that can make future marketing efforts effective. Several Mosaic segments rose to the top, but the “Aspiring Contemporaries” segment has the greatest potential to capture regional audiences for a large cross-section of ASNSB sites. Within a 10-mile radius of the Byway live more than 238,000 relevant households.

The qualitative interviews underscored the finding, initially identified through visitor surveys, that most Arroyo visitors seek experiences “off-the-beaten-path”. The interviews provided insight into visitor preferences and a more nuanced understanding of their behaviors. The interviews allowed us to “test fit” the five most relevant Mosaic groups identified in the survey component of our research: Aspiring Contemporaries, Affluent Suburbia, Upscale America, Blue Collar Backbone, and Struggling Societies.

We believe the data offer support for expanding Byway visitorship through creative marketing to local, demographically-relevant households; through cross-promotion among the Byway's sites; and, longer-term, expanded national visitation through the Byway's partners. All of these can be made more effective by targeting messages and promotions to people whose interests align with the experiences the Byway offers.

# Acknowledgments

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We would like to extend our great appreciation to Nicole Possert, of the Arroyo Guild, who organized and managed this work, and to Amy Webb, director of Heritage Tourism at the National Trust for Historic Preservation, who championed the team which assessed the Arroyo Seco sites and their interpretation. Thanks to Max Van Balgooy, also at the National Trust, who was part of the assessment team and provided additional guidance for this phase. And thanks to Cara Meyer at MRCA and Linda Taira at Caltrans for their contract management and oversight.

We are grateful to seven cultural, natural, and commercial sites where we conducted visitor intercept surveys and the staff at those sites who provided permission and access:

- Jessica Maria Alicea-Covarrubias and Heritage Square Museum
- Jeff Chapman and Debs Park Audubon Center
- Su Ellen Cheng and El Pueblo de Los Angeles
- Suzanne Isken and the Craft and Folk Art Museum
- Bobbi Mapstone and the Gamble House
- John Neese and Galco's Soda Pop Stop
- Sean Woods and Stephanie Campbell and Los Angeles State Historic Park

Special thanks to Michael McDowell at LA Inc. for providing advice and strategic guidance to our work.

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# Background

A set of partners that includes Caltrans, the Mountains Recreation and Conservation Authority, the Arroyo Guild, and various cultural, natural, recreational, and commercial sites along the Arroyo Seco Parkway is currently developing an interpretive plan for the Arroyo Seco National Scenic Byway (ASNSB). This interpretive plan will include both the historic road itself and its many nearby destinations. In order to develop a strategic interpretive plan – one that addresses the attractions and the real people likely to visit the ASNSB – we were engaged to conduct market research on current and potential visitors.

The overall purpose of this research is to identify the characteristics of current visitors to Byway sites and to use that information to profile and quantify potential visitor markets, develop a marketing plan to reach new visitors, help current visitors discover new places they did not know, and ultimately to expand the Byway's audiences.

Our work was divided into two components:

- Part 1 consisted of a visitor survey conducted at various locations and quantitative analysis of the survey results.
- Part 2 included interviews of visitors and qualitative analysis of their preferences and lifestyle segments.

Both components were conducted over a year-long period during 2011 and they built upon an assessment and profiles of sites completed in 2010.<sup>1</sup> This work is being conducted by the Community Land Use and Economics Group, a market research firm based in Arlington, Virginia. CLUE Group collaborated with Decision Support Partners, an arts and culture strategy and market research firm, based in Bozeman, Montana.

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<sup>1</sup> Joshua Bloom of CLUE Group, who led this market research, also participated in the assessment phase.

## **Study questions and goals**

We began by identifying, in collaboration with ASNSB leaders and the National Trust, several key questions related to current and potential visitors of the Byway and its associated sites. These included:

- Who are the current audiences for the Byway and its sites and where do they come from?
- What are visitors' interests and travel preferences?
- Who are the aspirational audiences for the Byway – audiences that don't currently come, but should?
- How can the Byway and its individual sites reach these audiences?
- Can we quantify the market size and potential impact of current and potential visitors?

The Byway itself is a road connecting a very diverse set of places and individual sites. Because it is not feasible to survey or interview travelers on the road itself, we developed a methodology to study visitors at nearby sites.

## **Methodology**

We collected primary data through two means: intercept surveys and interviews. We used the resulting visitor characteristics to do further demographic analysis using secondary sources, including data services from ESRI and Experian.

Visitor surveys. We sought to collect 50 surveys from each of eight different sites along the Byway. (Some sites yielded fewer surveys and some yielded more.) A total of 441 surveys was collected. In aggregate, the surveys form a sample set with tight margins of error (about 5%) and high confidence levels (about 95%). However, the smaller samples collected at the individual sites have higher margins of error and lower confidence levels – parameters that vary with the number of surveys collected and the total number of visitors at a given site.

Surveys were conducted from March 21 through April 24, 2011, at the following places. (Parentheses represent number of surveys collected):

- Debs Park / Audubon Center (32)
- El Pueblo (87)
- Galco's Soda Pop Stop (53)

- Gamble House (42)
- Heritage Square (37)
- LA State Historic Park (50)
- Metro Gold Line (80)
- Craft and Folk Art Museum (50)

The first seven sites are along the ASNSB and were selected as representative of the dozens of resources in the Byway region. They cover a sample of parks and natural areas, museums and historic houses, historic businesses and commercial centers, and transportation. The Craft and Folk Art Museum (on L.A.'s West Side, near La Brea) was surveyed and used as a "proxy site": a small, niche museum, elsewhere in Los Angeles, with potential crossover appeal to ASNSB visitors. We hypothesized that visitors to a museum like CAFAM may represent the *type* of visitor who would patronize the attractions along the Arroyo Seco.

Three sites – Debs Park, Gamble House, Heritage Square – self-administered the surveys using their own staff. At the remaining five sites, interns from Occidental College and additional short-term staffing were hired to conduct surveys. (We held a survey training session for the Occidental College interns.) All sites and survey takers were instructed to collect surveys on both weekdays and weekends, at varied times. The self-administering survey sites and the interns were also instructed in random-sample methodologies in order to assure that each visitor had an equal chance of being selected.

While we strove for a random sample, we observed in the data that several sites surveyed by interns (esp. El Pueblo, Galco's, LA State Historic Park, and Metro Gold Line) represented a demographic slice that was younger (and therefore less educated and less affluent) than the population we expected. We believe this bias is explained by the likelihood that younger people were more receptive to being approached by the college survey interns. In some tabulations, we controlled for this potential bias by looking at specific age brackets relevant to the sites, avoiding conclusions based only on age or income of respondent, and/or by looking at geographic distribution of respondents.

Interviews. As a means to gain a qualitative, more nuanced understanding of visitor types, habits, and preferences, we conducted follow-up individual interviews with a subset of surveyed visitors. Interviewees were not necessarily selected at random, but instead they were chosen to

cover the range of sites. Where possible, we also sought to achieve a balance of gender and ethnicity. From the 168 surveys collected in Part 1 of the research, 72 people were invited by e-mail to sign-up for an interview. (A \$10 Starbucks gift card was offered as an incentive and thanks for their time.) Three attempts were made to recruit people for the interviews; ultimately, thirteen people responded to our requests. All but one of the respondents live in the Greater Los Angeles area, so the line of questioning was developed to be appropriate to local and regional visitors, more than out-of-towners. Interviews were conducted by phone between October 28 and November 18, 2011.

In the interviews, we sought to understand visitors’:

- Associations with the Arroyo Seco Parkway – and whether they have heard of it;
- Familiarity with sites along the ASNSB;
- Self-perceptions as more traditional or more adventurous visitors;
- Use of mobile technology and social media.

We asked about experiences during the visit when they were surveyed. Our line of questioning in the interviews included the following:

- Was your trip for work or pleasure?
- How did you hear about the site you visited, and what made you want to go?
- Did you decide in advance to go there specifically?
- If you were going to recommend this site to a friend or colleague, what kind of person do you think would be most interested in visiting this place?
- Did you visit any other cultural sites nearby or elsewhere in Los Angeles?
- Did you participate in any outdoor activities in the same trip?
- Where did you eat that you really enjoyed?
- Did you shop at any retail stores during your visit?
- Are you aware of the Arroyo Seco Parkway, and what are your impressions?
- Did you use a guidebook? Do any research online? Or use any social media, such as Facebook or Twitter?
- Did you look anything up while you were actually visiting places (e.g., on your phone or laptop)?

- Do you prefer to visit places that are considered “established”, or places that are considered “off-the-beaten-path”, or places that are considered “edgy” by most people?
- What would be an example of a place like that, that you have enjoyed in the past year – and how does it fit your preference for [established, off-the-beaten-path, or edgy]?
- How did you hear about that place?
- What did you like about that experience?

Because of the nature of in-depth interviews, the line of questioning was adjusted for relevance to each interviewee. We then analyzed and connected the qualitative data summarized in the interviews to the quantitative data gathered through the surveys.

### **L i m i t a t i o n s**

As is true of all demographic, economic and market studies, the reliability of our analysis is limited to the reliability and quality of the data available. Our research assumes that all data made available by federal, state, and city sources is accurate and reliable. For this work, there are three limitations worth mentioning:

As a practical matter, we conducted research at a sample subset of the 30-plus ASNSB associated sites. The visitors at these sites may or may not reflect visitors to other sites where we did not conduct research.

Because we chose not to ask personally identifying information of visitors, we made rational assumptions in order to categorize people by Mosaic segment. These assumptions were based on reasonable understanding of visitors and an in-depth knowledge of Mosaic segmentation. We cannot know the accuracy of our categorization to a certainty.

The set of sites is so diverse – including natural, cultural, and commercial places – that most visitors do not see them as part of a set, and the sites have never been marketed together. Therefore, the applicability of visitor data from site to site may be limited.

Given these limitations, our report reflects what we believe are reasonable estimates of historic trends, current conditions, and future possibilities.

# Visitor surveys

The surveys provide a snapshot of the Byway's diverse visitors overall. In addition, the surveys allowed us to analyze relationships among sites and the types of visitors who come to each. The surveys also provide a profile for each individual site, including its trade area and visitor demographics.

We excluded data from the Gold Line from most of our analysis because it became evident from the Gold Line surveys that its riders view it as a “means” rather than a “place”. In most cases, we tabulated Craft and Folk Art Museum (CAFAM) surveys separately and used them for comparative purposes, in order to see how its visitors are similar to, or different from, ASNSB visitors.

## **Trade areas**

Defining relevant trade areas is important to marketing any destination or attraction because knowing where visitors (or customers) come from can help prioritize where to spend limited marketing resources. The various sites along the Byway draw visitors from catchment areas that vary by site, from *very* local to regional audiences to, in a few cases, national.<sup>2</sup>

Overall, 77% of visitors to the surveyed sites live in Greater Los Angeles. Of those coming from areas outside Greater Los Angeles, about 11% were visiting for the day and 11% stayed overnight for pleasure. The map below illustrates place of residence for all US-resident survey respondents. (Two percent of survey respondents live outside the US.)

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<sup>2</sup> We have used “trade area” and “catchment area” interchangeably. “Trade area” typically refers to the geographic area from which customers are drawn. “Catchment area” has the same meaning, without implied commerce.

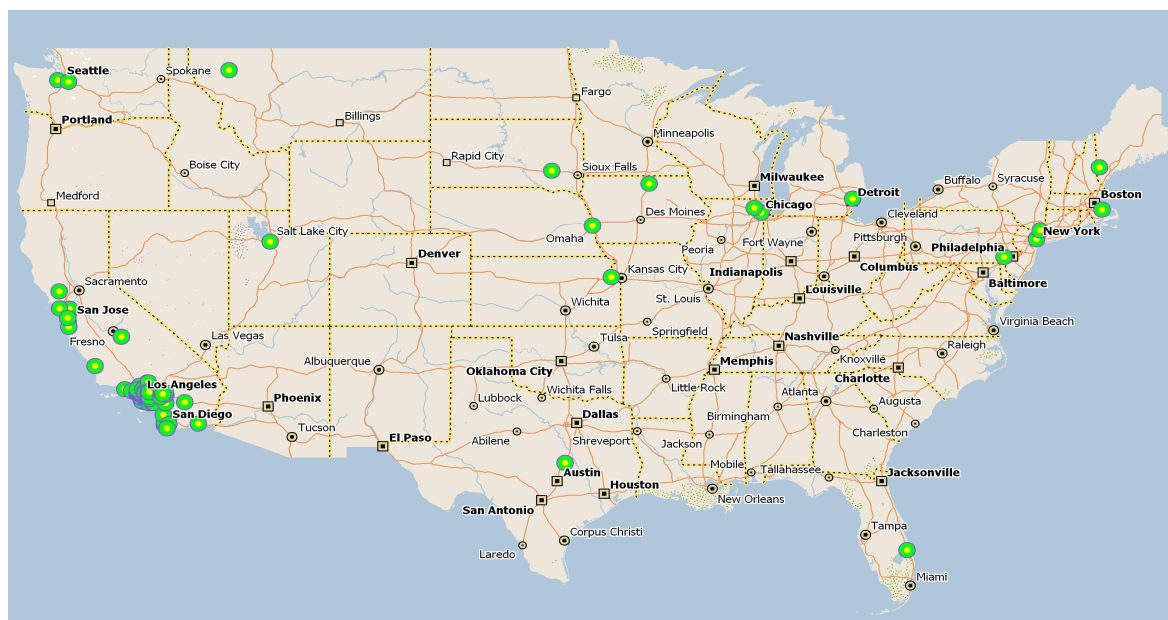


Figure 1: Zip codes of all survey respondents.

The dispersal of “non-L.A.” visitors affects the potential for direct marketing to those individuals because they are scattered across the country. However, among respondents who live outside Southern California, the most significant second cluster of visitors resides in Northern California – a region that is also acknowledged by LA Inc. and other tourism officials to be the largest source of visitors to Southern California.

Because more than three-fourths of respondents live in Greater Los Angeles, we mapped the home zip codes of respondents to visualize the areas of greatest concentration and greatest draw. In the maps below, dark blue dots represent Byway attractions (both survey sites and non-survey sites), as well as a few places which are not currently Byway partner sites but which

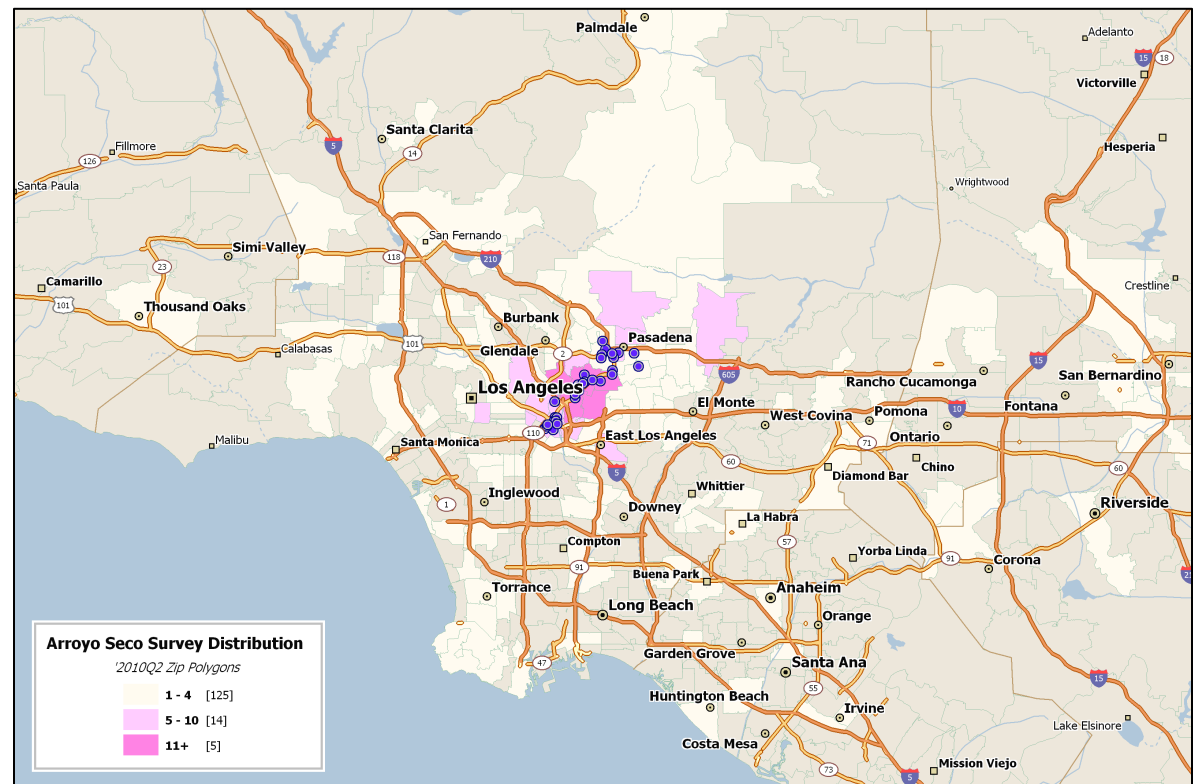


Figure 2: Zip code density for survey respondents living in Greater Los Angeles.

the survey referenced (e.g., The Huntington, Norton Simon Museum, etc.). Visitors reside across L.A., the San Fernando Valley, and eastern cities and suburbs. Dark pink indicates areas of greatest draw; the lightest shading indicates areas where the visitor draw from the sample is the lowest. (Gray shading indicates no respondents.) The catchment area generally extends north to Palmdale, south to Irvine, and east to San Bernadino.

Zooming further in to Northeast Los Angeles and vicinity, the map below reveals a dark pink polygon (roughly five miles across) where most current visitors reside. (As in the previous map, the lightest shading indicates 1-4 visitors per zip code.)

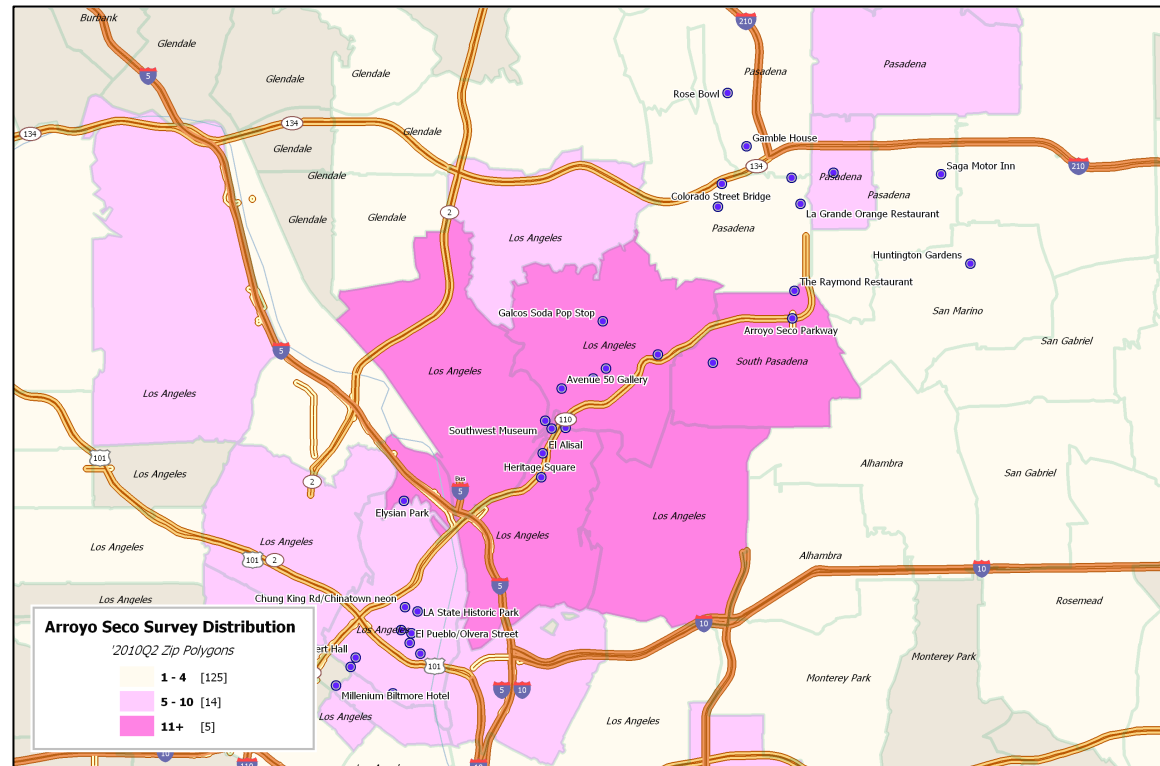


Figure 3: Zip code density for survey respondents living in Northeast Los Angeles.

Overall, surveys from all sites indicate that local visitors predominate, at least for the ASNSB's *current* catchment area. The distribution may become more geographically diverse in the future, as the Byway and its sites gain recognition. Still, it is important to note that heritage destinations in such a large population center as Southern California have tremendous growth potential in the regional market alone.

All sites draw the largest portion of their visitors from Greater Los Angeles, but the proportion varied greatly by site. Debs Park/Audubon Center respondents were entirely regional, while the Arroyo Seco National Scenic Byway Market Research

Gamble House attracted almost half its visitors from beyond the Greater Los Angeles. (See the table, below.) Still, even for the Gamble House, Greater L.A. makes up the largest source of its visitors.

**Visitors who live in Greater Los Angeles, by survey site**

Debs Park/Audubon Center	100%
LA State Historic Park	98%
Metro Gold Line	96%
Galco's	87%
Heritage Square	75%
El Pueblo	63%
Gamble House	51%
CAFAM	70%

**Using CAFAM as a comparable**

We included a proxy site among the survey locations because we recognized that if we only surveyed at ASNSB sites, we could miss potential visitors who go to similar kinds of niche destinations in Los Angeles but who, for whatever reason, have not found their way to the Byway.

In the survey analysis, we looked at several data points to compare CAFAM visitors to other ASNSB sites. CAFAM is not perfectly analogous to any Byway site, but there are strong similarities among CAFAM and some Byway visitors.

The survey asked three “lifestyle” questions which themselves serve a proxy function: they help to profile visitors and their preferences, and the ways in which consumer or leisure preferences differ even among people who may have similar demographic characteristics. In the table below, we compared CAFAM visitors to the two ASNSB survey locations – Gamble House and Heritage Square – that most closely resemble a specialty museum. In many areas, visitor lifestyle choices align:

- For a leisure activity, the majority (52%) of visitors at all sites prefer a museum or art gallery to the four other activities offered;

- In vehicle preference, surveys show a common rejection of the motorcycle or minivan as characterizing their lifestyle, and they expressed a preference for an SUV or luxury sedan.
- Among retail stores, CAFAM visitors are less likely Walmart shoppers than visitors to Gamble/Heritage Square. (CAFAM visitors prefer Kohl's as their discount apparel source.) However, the sites showed close commonality in preference for Macy's and Nordstrom, with an approximately equal split between the two stores.

<b>For a leisure activity, which of the following would be your favorite destination?</b>	<b>Gamble + Heritage Sq</b>	<b>CAFAM</b>
Museum or art gallery	52%	52%
Professional sporting event	5%	0%
Shopping and dining area	10%	8%
Theme park	5%	10%
Outdoor recreation area (e.g., hiking, skiing, running, etc.)	28%	30%

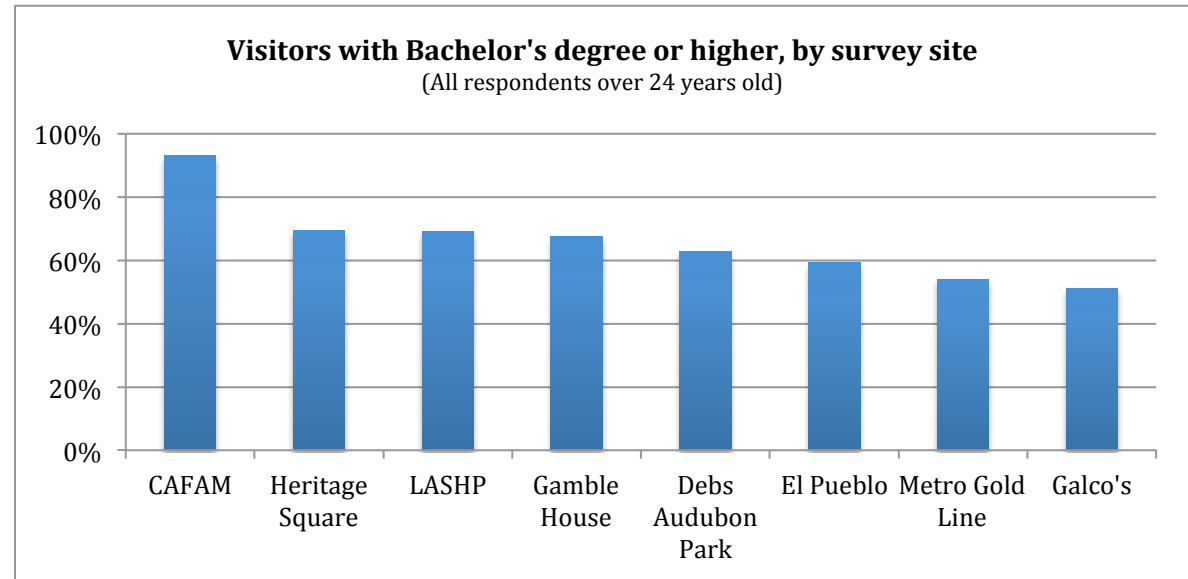
  

<b>If you could buy any vehicle, which would you choose?</b>		
A motorcycle	14%	14%
A minivan	15%	16%
A SUV	34%	23%
A luxury sedan	37%	48%

<b>Where would you be most likely to go to buy casual clothes?</b>		
Walmart	17%	4%
Macy's	29%	30%
Nordstrom	28%	30%
Kohl's	25%	35%

CAFAM visitors are more highly educated than visitors to the other surveyed sites, with 93% having a bachelor's or graduate degree. The three next sites with the most highly educated visitors are Heritage Square, LA State Historic Park, and Gamble House.<sup>3</sup>



#### **Site familiarity and potential partners**

The Arroyo Seco Parkway has several names (110, Pasadena Freeway), and survey responses suggest some combination of confusion or lack of name recognition for the Parkway. Among 30% of visitors who say they have never driven on the Arroyo Seco Parkway, the majority (about 72%) live in Greater Los Angeles. Among the smaller number of people who say they are not sure what the ASP is, about half of them live in Greater Los Angeles, with the remainder visiting

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<sup>3</sup> Education tabulations included only respondents over 24 years old.

from elsewhere. If we had asked, “Have you driven on The 110 or Pasadena Freeway?”, the response likely would have been much higher.

**Have you ever driven on the Arroyo Seco Parkway? (All respondents)**

No	30%
Yes	57%
Not sure what it is	13%

Another way of looking at it is, 22% of area-resident respondents say they have never driven on the ASP, and 7% of area-resident respondents are not sure what it is. Because the ASP is such an important road in Greater Los Angeles, and because many of the surveys were conducted at sites proximate to the Freeway, it is likely that some people who said they had never driven on the Freeway were actually unaware of its alternative name. We delved deeper into ASP name recognition in interviews (see “Visitor Interviews” chapter).

We used the surveys at the eight sites to assess visitor familiarity with a larger set of ASNSB resources, half of which we were not able to survey directly. In gauging familiarity, we asked if respondents had “been to,” “heard of,” or “never heard of” the places in order to measure overall recognition and determine if visitors to particular sites (or particular types of sites) tended to be familiar with certain other sites.

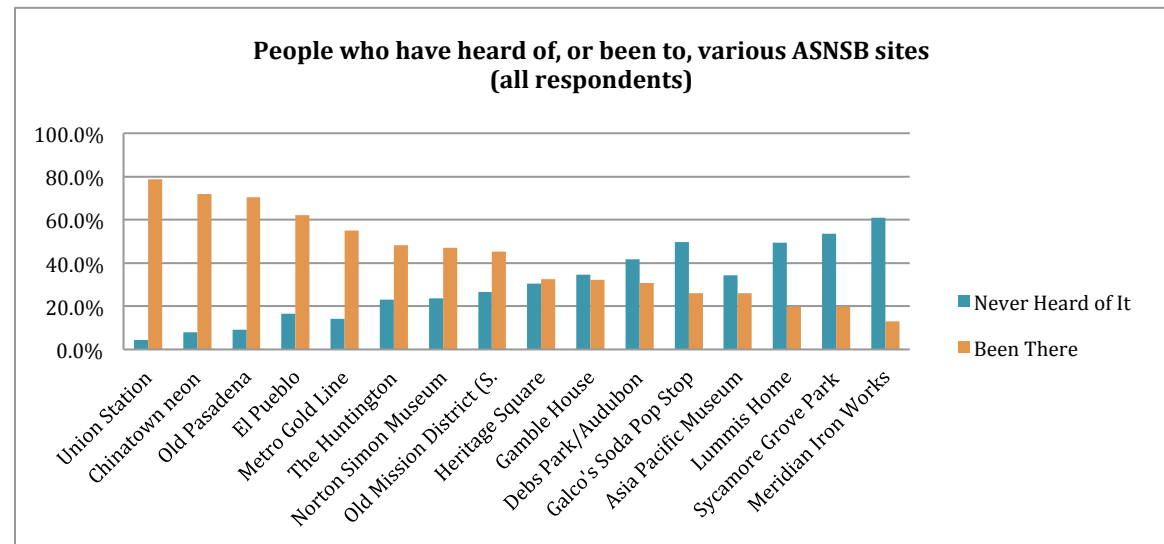
In our analysis, we focused on “been there” and “never heard of it” responses because they are more definitive than “heard of it.” “Heard of it” is informative for name recognition, but “been there” demonstrates a known action. As a general rule, past actions are good indicators of future intentions and behaviors.

Half of the 16 sites show high or very high past visitorship by survey respondents overall. (The top eight sites all exceed 40% visitorship by the surveyed population, and three of the sites exceed 70%). We did not find any of the sites grouped in the top eight surprising; they are all well-known:

- Union Station
- Chinatown
- Old Pasadena

- El Pueblo
- Metro Gold Line
- The Huntington
- Norton Simon Museum
- Old Mission District (South Pasadena)

It is worth noting that two of the sites – El Pueblo, and Metro Gold Line – were survey sites. This impacts their ranking, since anyone who responded to a survey distributed at that site has (by definition) been to that site. Still, several places that are arguably not as well known, such as Norton Simon and South Pasadena’s Old Mission District (and where surveys were *not* conducted) are included in this group of eight.



Near the bottom of the name recognition and visitorship rankings (though the ratios of recognition to visitation vary by site) are:

- Meridian Iron Works Museum (South Pasadena)
- Sycamore Grove Park
- Lummis Home

- Galco's Soda Pop Stop
- Debs Park/Audubon Center

For three sites, the number of people who had never heard of them and the number of people who had visited them was about equal:

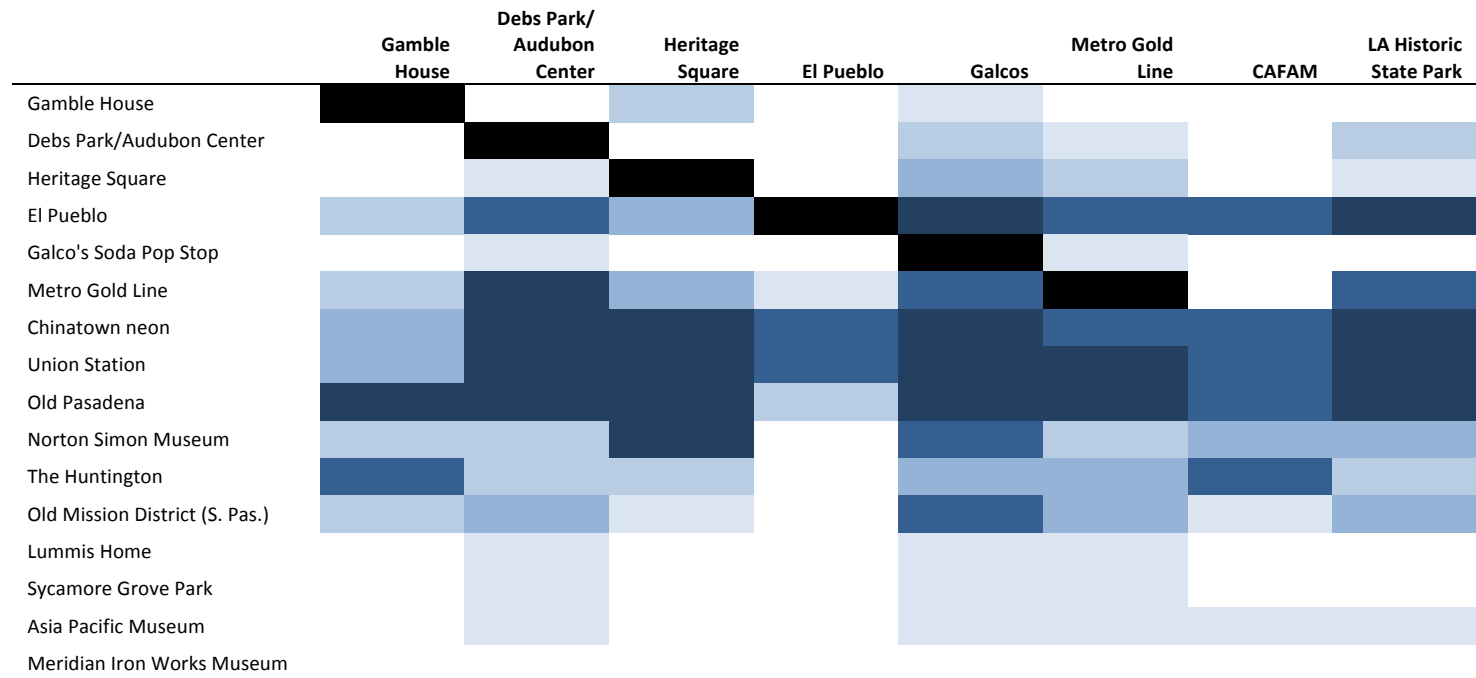
- Heritage Square
- Gamble House
- Asia Pacific Museum

We tabulated the “Been there” responses to assess cross-visitorship – how common it is for visitors from one site to have also visited one of the other Byway resources. Most sites had at least some shared visitors. We made the following observations:

- Galco's customers have high visitation rates for many of the other sites. At least 45% of Galco's customers had *also* visited 10 out of the 15 other sites. However, the converse is not true: visitors to the other five survey sites are not as familiar with Galco's. This is especially true of visitors to the Gamble House and El Pueblo (and CAFAM, though not an ASNSB site), at which less than 10% of their visitors had also visited Galco's.
- Some affinities we expected to see were not confirmed. For example, at the Gamble House, very few visitors (14%) had also been to the Lummis Home, another Arts & Crafts house museum. (In fact, in separate tabulations not illustrated below, only another 15% had *heard* of the Lummis Home and 70% had not heard of it at all.)
- Only a moderate number of people who visited the two parks or natural sites where we conducted surveys (Debs Park and LAHSP) had also visited Sycamore Grove Park. (In other tabulations not illustrated below, only about one-half of respondents at Debs or LAHSP had ever *heard* of Sycamore Grove Park.)
- Visitors to the parks were likely to have also visited several of the well-known non-park sites. However, they were no more likely than others to have visited smaller sites.
- Visitors to CAFAM were familiar with major attractions in and around ASNSB (e.g., 68% have been to Chinatown and 62% have been to The Huntington), but were less likely than people at other survey sites to have visited smaller, niche attractions in the Byway

– especially those in the middle of the spine (e.g., those sites between Downtown LA and Pasadena). This is significant because, if we believe CAFAM visitors represent a target type of individual who might be interested in what the Byway has to offer, those CAFAM visitors will need to be made more aware of the Byway’s resources.

The graphic below illustrates the extent to which visitors at the *surveyed* sites (columns) have visited other ASNSB sites. Darkness of shading corresponds to the percentage who have visited other sites. (See key.)



**Key:**

Less than 30%

30-39%

40-49%

50-59%

60-69%

Over 70%

Figure 4: An illustration of the likelihood that surveyed visitors (columns) have visited other ASNSB sites (rows).

### **Visitor travel preferences and self-perceptions**

We assessed visitors' self-identified preferences through three questions that asked about preferences for visiting "well-known and established" places versus less-well-known or "edgy" places. Respondents scored themselves on a 1 to 5 rating scale (1 = "Doesn't describe me at all"; 5 = "Describes me very well") for the following:

- I prefer to visit places that are well known or established.
- I prefer to visit places that are somewhat off the beaten path and not very well known to most people.
- I like to visit places that are considered "edgy" or "alternative" by most people.

Analysis of the rankings of each statement yielded only subtle differences in mean scores. Tabulations for surveys sorted by site revealed none of the mean scores to be statistically differentiated from each other. (See appendix for table of full tabulations.)

Most people identified strongly with *all* of the options – that is, most people say they like "well known" places, "off-the-beaten-path" places, AND "edgy" places. While we were anticipating more differentiation, it is, in fact, possible to imagine an individual visitor enjoying all three types of experiences.

We were able to discern some differentiation by looking only at people who said the statements described them well – and scored the statements as "4" or "5". We were able to make the following observations:

- Gold Line riders are most inclined to prefer "well-known and established" places.
- CAFAM visitors in particular are *least* inclined to favor "well-known and established" places. Debs Audubon Park, Gamble House, and Heritage Square showed similar leanings.
- Visitors to Heritage Square and several smaller sites are more likely to favor places "somewhat off the beaten path", while Gold Line riders and El Pueblo visitors are *less* inclined to favor such places. Nevertheless, the absolute scores in this category were high, with at least 60% of visitors to *all* of the sites expressing a preference for "off the beaten path".

- Ironically, while Debs Park visitors like places that are “somewhat off the beaten path”, they are least likely to seek out “edgy” or “alternative” places, suggesting slightly more traditional (or perhaps less adventuresome) inclinations.

These observations hint at subtle differences in the ways people view themselves. People who visit places like the Gamble House, Heritage Square, or CAFAM – places that leaders of the ASNSB initiative, and we as market analysts – might view as “established” and “well-known” – are likely seen by their visitors as less-known places, undiscovered by the general public. They may see these resources in quite the opposite way from how even the sites view themselves: visitors may see themselves as seeking out special places, hidden gems. These subtle differences can have significant implications for how ASNSB markets itself (and how the individual sites market themselves).

Responses indicate that most people see themselves as *wanting* to visit more obscure places. And while the preference for edgy/alternative places was not as strong as “off the beaten path,” the surveys indicate an attraction to edgy/alternative places that is stronger than we expected to see.

The expressed preferences *may* be aspirational, since self-perception is different from actual behavior. We explored these questions of self-perceptions further in interviews with survey respondents.

	% of respondents who scored this statement "4" or "5"
<b>I prefer to visit places that are well known and established.</b>	
Gold Line	57%
El Pueblo	47%
Galco's	45%
LASHP	39%
Debs Audubon Park	31%
Heritage Square	31%
Gamble House	28%
CAFAM	21%
<b>I prefer to visit places that are somewhat off the beaten path.</b>	
Heritage Square	81%
Debs Audubon Park	78%
Galco's	76%
LASHP	74%
Gamble House	70%
CAFAM	67%
El Pueblo	63%
Gold Line	60%
<b>I like to visit places that are considered "edgy" or "alternative."</b>	
LASHP	64%
El Pueblo	63%
CAFAM	61%
Galco's	57%
Heritage Square	57%
Gamble House	53%
Gold Line	48%
Debs Audubon Park	42%

### Visitor lifestyle segmentation and strategy

Mosaic™ is a geodemographic segmentation and consumer analysis system developed by Experian and marketed by Applied Geographic Solutions. “The basic premise of geodemographic segmentation is that people tend to gravitate towards communities with other people of similar backgrounds, interests, and means.”<sup>4</sup> Mosaic uses Census and other information about households to help retailers and other businesses identify and target their markets.

The following five Mosaic groups are prevalent and most consistent among zip codes represented across the survey sample. (See “Visitor Interviews” chapter for detailed Mosaic descriptions.)

- Affluent Suburbia
- Upscale America
- Blue Collar Backbone
- Struggling Societies
- Aspiring Contemporaries

Mosaic segment of visitors, based on respondents’ home ZIP code	% of Households in survey sample
<b>Affluent Suburbia</b>	<b>17%</b>
<b>Upscale America</b>	<b>20%</b>
Small Town Contentment	4%
<b>Blue Collar Backbone</b>	<b>10%</b>
American Diversity	6%
Metro Fringe	4%
Remote America	0%
<b>Aspiring Contemporaries</b>	<b>19%</b>
Rural Villages & Farms	0%
<b>Struggling Societies</b>	<b>16%</b>
Urban Essence	3%
Varying Lifestyles	0%
Total Households in Survey ZIP Codes	100%

<sup>4</sup> Applied Geographic Solutions

Households in the **Affluent Suburbia** and **Upscale America** groups have similar characteristics to each other and are most closely aligned with more formal sites such as museums and heritage destinations. The demographics among visitors to more formal sites are fairly consistent with this analysis as well.

**Blue Collar Backbone** and **Struggling Societies** households are more like each other than they are like Affluent Suburbia and Upscale America households. These two groups are lower on the socio-economic scale, are most closely aligned with informal destinations including parks and local attractions such as Galco's, and they are younger, less educated, and more ethnically diverse.

**Aspiring Contemporaries** are younger, leading edge consumers. Research has shown that older, culturally included folks (e.g., in the affluent, suburban groups) tend to glance to them and follow their lead to "catch up" with what's hot and new. Less affluent, less educated, and more economically challenged householders also look to Aspiring Contemporaries as perhaps their next rung on the social economic ladder, aspiring to be like them.

**Aspiring Contemporaries** is a Mosaic group that is prevalent across all of the sites and we believe could serve as the focus, or anchor, for a local and regional marketing strategy for the Byway and its many, varied attractions. By focusing on *one* target group that straddles the various sites – a target group that straddles the affluent, suburban groups and the less affluent, urban and outlying groups – it is likely that the messaging, media placement, and positioning of the Byway corridor experience could "bring along" these other population segments.

This rationale was adapted from a strategy that worked exceptionally well for the San Francisco Museum of Modern Art's 75<sup>th</sup> anniversary celebration – an event that, while focused on the institution and its past and future, was designed as a community celebration with a multitude of ways to engage. While SFMOMA focused on a different Mosaic segment, the Museum successfully engaged target groups on all sides of that core group for similar reasons.

### Sizing the market

The potential regional visitor market demonstrated by the surveys is huge. The Greater Los Angeles zip codes represented in the survey, in aggregate, contain over 2 million households. The following table shows the number of households by Mosaic segment.

Mosaic segment	No. of Households in aggregate survey area
<b>Affluent Suburbia</b>	<b>365,118</b>
<b>Upscale America</b>	<b>441,056</b>
Small Town Contentment	81,055
<b>Blue Collar Backbone</b>	<b>219,341</b>
American Diversity	129,792
Metro Fringe	94,500
Remote America	3,381
<b>Aspiring Contemporaries</b>	<b>409,431</b>
Rural Villages & Farms	5,849
<b>Struggling Societies</b>	<b>339,856</b>
Urban Essence	73,954
Varying Lifestyles	3,729
Total Households in Survey ZIP Codes	2,167,062

Because of the size of the region, some of these households may live an hour or more drive from the Byway. While the supporting detail on the trade area analysis produces slightly different “local” and “secondary” market areas for each site (see appendix), as a whole the Byway corridor would benefit from direct marketing to target households in a primary trade area of roughly a 10 mile radius (or distance from) the Byway. Secondly, the Byway can position itself as a destination for compatible households in a regional geography with roughly a 30-mile radius from the Byway. Initially, however, direct marketing of the Byway should focus on the primary trade area.

The next table illustrates the number of households, by Mosaic segment, in each of these trade areas. In the primary market area alone, Aspiring Contemporaries represent 238,284 households. Adding the most closely aligned “piggyback” households (Affluent Suburbia and Upscale America), the total number of households exceeds 400,000.

Mosaic segments	Households in 10-mile radius	Households in 30-mile radius
Aspiring Contemporaries	238,284	726,595
<i>Piggyback groups</i>		
Affluent Suburbia	79,707	500,425
Upscale America	100,343	760,739
Blue-Collar Backbone	116,233	473,642
Struggling Societies	297,554	546,096

The first map below illustrates where each of the five most likely household types are dominant in area zip codes. The second map below illustrates regional zip codes where Aspiring

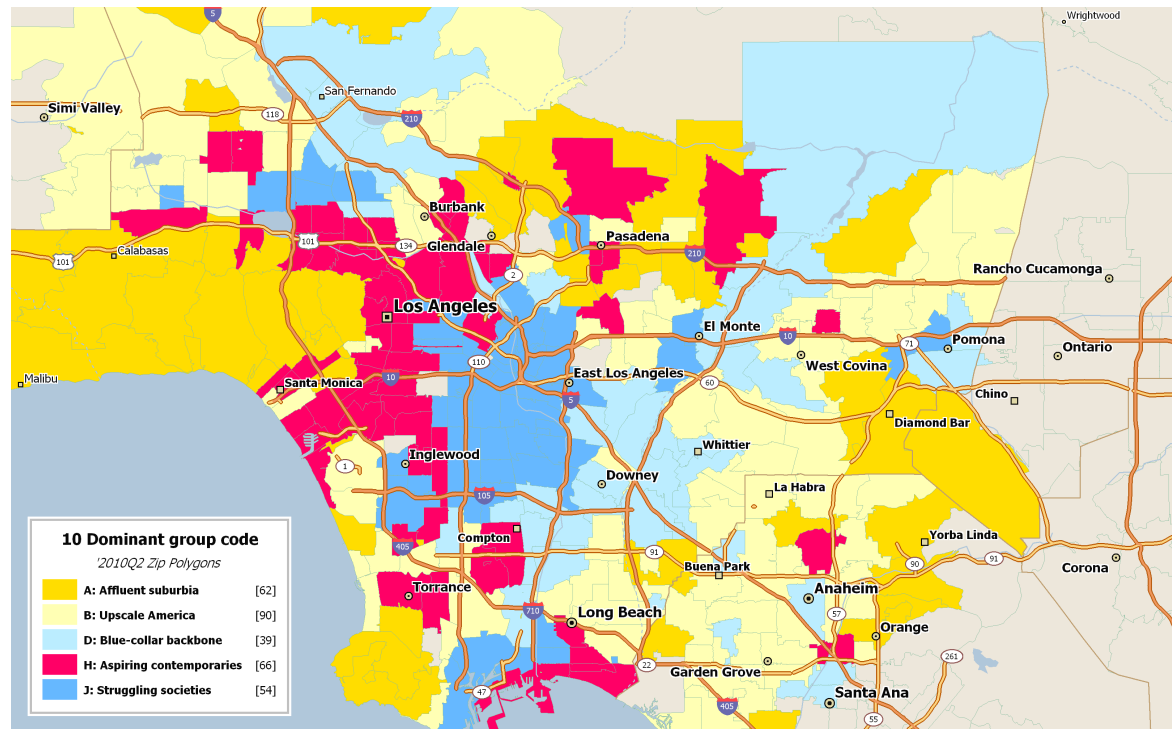


Figure 5: Dominant Mosaic segments for the zip codes of survey respondents.

Contemporaries are dominant. Narrowing the marketing strategy geographically to where the Aspiring Contemporaries reside would help to focus the resources while reaching a large audience of potential Byway visitors. (A complete list of relevant zip codes is provided in the appendix.)

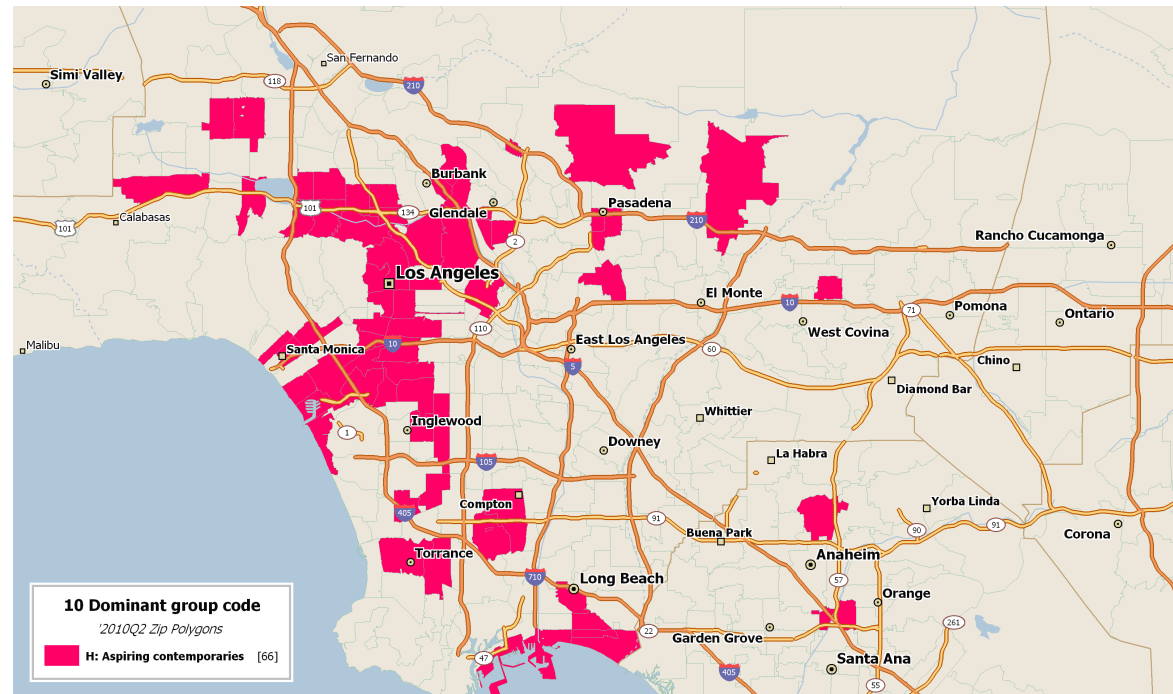


Figure 6: Zip code areas for survey respondents where "Aspiring Contemporaries" is the dominant Mosaic segment.

### **More about Aspiring Contemporaries**

As a national group, Aspiring Contemporaries share characteristics in their desires to be “in the know” and in their adventurous lifestyle preferences. Although they are not wealthy, they are highly educated and they are seen as trendsetters. Within the 10-mile primary trade area for the Byway and its sites, the following 10 zip codes are dominated by Aspiring Contemporaries households:<sup>5</sup>

<b>Place</b>	<b>Zip code</b>
Los Angeles	90010
Los Angeles	90019
Los Angeles	90026
Los Angeles	90027
Los Angeles	90038
Los Angeles	90046
Los Angeles	90068
Burbank	91501
Monterey Park	91755
Alhambra	91803

Aspiring Contemporaries are also a diverse set of households, especially in Los Angeles. In the zip codes, above, where Aspiring Contemporaries are prevalent, less than half of all households classify themselves as Caucasian and 40% self-describe as Hispanic origin. The households are highly educated, with 37% having at least a college degree.

For comparison purposes, the proportion of Caucasian households in these zip codes is less than in the City of Los Angeles as a whole (50%) and the proportion of Hispanic households is slightly lower than the city as a whole (48%). Income is lower (compared to \$49,138 for the city). This diversity is extraordinary. It is important to keep in mind that the demographic characteristics represent nearby zip codes where Aspiring Contemporaries dominate. (It does not include Highland Park’s zip code – even though Highland Park contains some Aspiring Contemporaries – because the segment does not represent a majority of households in Highland Park.)

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<sup>5</sup> The 10-mile radius was drawn from the center of Highland Park.

Within the 10-mile radius, the 10 zip codes (above) have the following aggregate demographic characteristics:

Median household income	\$44,829
Household size	2.48
Age of primary householder	35.6
Caucasian	44%
Black	7%
Hispanic origin (any race)	40%
Asian	20%
College degree	24%
Graduate degree	13%

Sources: Experian/Mosaic USA; ESRI; CLUE Group

Aspiring Contemporaries as a national segment are described as follows:

Segment definition: Aspiring Contemporaries

*The households in this group are filled with upward strivers, overwhelmingly dominated by younger, mostly unattached residents (GenXers, Millennials) and a population that is ethnically diverse. Typically about two-thirds of the adult population are single or are divorced.) While not as affluent as some of their neighbors, these households tend to be solidly middle-class, residing in newer homes and apartments valued at more than the national average, usually a sign of upward mobility. These young, active householders are culture buffs who like to go to see plays, movies, comics and live bands. They spend a lot of their discretionary income on the latest fashions and on consumer electronics. They are also heavy media users, listening to jazz on the radio and reading the Sunday paper for science and technology news. Raised on technology, they are extremely technology savvy and spend much of their leisure time online doing virtually everything.*

Source: Experian/Mosaic USA

**Buying power**

Buying power – the amount of money households spend on various goods and services – is relevant for several types of purchases which may be made by Byway visitors at or around the

Byway sites. These purchases include admission to the sites themselves (for those that charge admission), restaurant dining, gift purchases, and related entertainment purchases. For the primary trade area zip codes in which Aspiring Contemporaries dominate, households have aggregate buying power as follows:<sup>6</sup>

<b>Product</b>	<b>Total expenditures</b>
Food away from home (i.e., restaurants)	\$ 515,320,000
Fees and admissions (for all entertainment and recreation)	97,978,000
Apparel purchases (men's and women's)	132,258
Apparel purchases (children's)	47,460,000
Toys and games	21,804,000
Sports and recreation equipment	21,225,000
Photo equipment and supplies	16,028,000
Reading materials	23,555,000

Restaurant dining is the most likely of consumer purchases to be made by visitors while in the Byway area. The expenditures listed in the table are *local* expenditures. Additional spending is brought to the Byway area by visitors from further away in the Los Angeles region, or by tourists from elsewhere. Capturing an additional 0.5% increment of restaurant spending at restaurants near the Byway or its sites would represent \$2.5 million in additional sales. For people who live in the primary trade area for the Byway sites, the challenge is to encourage them to use business amenities near Byway attractions and thus increase the proportion of those households' local purchases.<sup>7</sup>

### **T r a n s p o r t a t i o n**

Of 361 surveys collected at sites other than the Gold Line itself, only 18 people used the Gold Line as transportation to the site – about 5% of visitors to the five surveyed sites. El Pueblo and LA State Historic Park were the only two sites where Gold Line use was marginally significant.

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<sup>6</sup> Purchase categories are representative of those where data is available and which are most relevant to potential visitor expenditures.

<sup>7</sup> While it is possible to quantify the purchases of those in the larger Los Angeles region, the data become less meaningful because the capture rate would be very small.

The number of Gold Line users at El Pueblo was likely higher than typical because some surveys were conducted during a special-event weekend, when parking at the site was limited and visitors were encouraged to use public transit. At all other sites, virtually all visitors arrived by car.

**People who took the Gold Line to visit various sites**

El Pueblo	15%
LA State Historic Park	8%
Debs Park / Audubon Center	3%
Gamble House	0%
Heritage Square	0%
Galco's Soda Pop Stop	0%

**Visitor use of web resources and smart phones**

We asked several questions related to how visitors to the surveyed sites gather information when they are traveling or visiting a regional destination. We also asked a few questions specifically related to the use of cellphones and “smart phones” as travel tools, in order to see what kinds of technology would be most likely to be adopted and used by Byway visitors.

As the table below illustrates, the most Byway visitors have used a guidebook as a way to learn about places when they have traveled. (CAFAM responses are shown for comparison purposes.) A majority (61%) of respondents *also* report having used a self-guided walking or driving tour.

Visitor experience drops off significantly for both cellphone and Podcast tours. Note that both of these are audio tours (as opposed to printed guide books or self-guided walking/driving tours). The technology and/or the audio format may be limitations to broader adoption of these tools. (We explored these questions further in visitor interviews.)

<b>Have you ever used any of the following? (Check as many as apply)</b>	<b>All ASNSB sites (except Gold Line)</b>	<b>CAFAM</b>
A travel guide book	75%	83%
Self-guided walking or driving tour (e.g., following signs or a printed brochure)	61%	75%
Listened to a cell phone audio guide (e.g., dialed an audio tour from your cell phone)	26%	26%
Listened to a Podcast tour while visiting a destination or historic site	14%	17%

Smart phone ownership among surveyed sites is very high – 52% – compared to the general population.<sup>8</sup> A Nielsen report from May 2011 reports current smartphone ownership in the US at 38% of the total market (the other 62% owning so-called “feature phones”). Smartphone ownership is growing rapidly and is expected to overtake feature phone ownership in the next couple of years.

Among people who own smart phones, 81% of them have used them to learn about a place they are visiting. However, a much smaller proportion of users have scanned a bar code or QR code to gather more information – information about anything, not limited to a site they are visiting.

<b>Have used a smart phone to...</b>	<b>All respondents (exc. Gold Line)</b>	<b>Smart phone owners</b>
Learn about a place they are visiting	48%	81%
Scan a bar code or QR code for more information	23%	39%

We can further assess the potential for Podcast and QR code use in Part 2 interviews. Based on the surveys, it appears that QR code use has not yet reached broad adoption, even though smart phone owners use their devices to look up place-relevant information online.

While overall trends in technology use and ownership are outside the scope of this survey, it is reasonable to assume that in the near future (e.g., the next several years), it will be very likely that the majority of ASNSB visitors will have a mobile device capable of accessing:

- Podcasts or other tours
- Geo-integrated social media information, based on the visitor’s location
- Scanning QR codes to be directed to a website with interpretive information
- And other mobile tools not yet available.

How quickly visitors’ technical skills and comfort will change is hard to predict, but it is safe to assume they will grow.

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<sup>8</sup> Excludes Gold Line and CAFAM respondents.

## Visitor interviews

Interviewees represented survey respondents from seven of the eight sites where surveys were administered. Using the survey responses in the previous chapter, we correlated visitors with Mosaic categories by relying on their zip code of residence, their demographic characteristics, and their answers to several proxy questions about consumer preferences (e.g., cars, department stores, etc.).

The primary goal of the qualitative interviews was to gain an understanding of the opportunities and barriers to marketing the Byway, particularly to people who may see themselves as just visiting or interested in one specific place. With the Mosaic segmentation as a base, the intent of these interviews was to shed more light on how people describe themselves as visitors to cultural destinations (even in their own backyard), to learn of their familiarity, interest, and associations with the Arroyo Seco Parkway, and what encourages and discourages their patronage of sites within the Byway corridor.

<b>Mosaic segment</b>	<b>No. of interviews</b>	<b>Survey sites</b>
Affluent Suburbia/Upscale America	4	CAFAM, Gamble House (2), Gold Line
Aspiring Contemporaries	2	CAFAM, Debs Park
Blue Collar Backbone	5	Galco's, Gamble Hse, Heritage Sq, Gold Line (2)
Struggling Societies	2	LASHP

The Mosaic system is used primarily in the marketing of consumer products and services and in retail location decisions. We have used it as a tool to locate appropriate Byway visitors, but Mosaic itself does not track a segment's affinity for places and experiences like those offered in the Byway corridor. Our visitor interviews add texture to the standard Mosaic types and help to understand how Byway sites fit (or don't fit) into the typical preferences of the various Mosaic segments.

Visitor 1:

*This visitor drove to Debs Park and visited to see if it was a good place to bring children from a nearby preschool. She works in the area and has been to Chinatown, El Pueblo, Union Station, Debs Park, the Huntington, the Norton Simon Museum, Old Pasadena, and the Asia Pacific Museum. This visitor has never heard of Galco's or the Lummis Home and is not familiar with Arroyo Seco Parkway. Her preference in the proxy questions is for outdoor recreation, a minivan, Macy's, and places that are "well known" and "somewhat off the beaten path." She has used Facebook.com, travel guide books, and self-guided walking or driving tour, but does not have a smart phone. This visitor is age 35-44 with income between \$75,000 and \$100,000, female, White, and has a bachelor's degree.*

Visitor 2:

*This visitor drove to CFAM and visited as part of a scheduled art walk. In conjunction with the art walk he also went to Pan Pacific Park and Leimert Park. This visitor has been to Chinatown, El Pueblo, Union Station, Debs Park, Heritage Square, Galco's, the Lummis Home, Gamble House, the Huntington, Norton Simon Museum, Old Pasadena, and the Asia Pacific Museum. He has never heard of Sycamore Grove Park, Meridian Iron Works Museum, or the Old Mission District. Familiarity of the Arroyo Seco Parkway is limited. On the proxy questions, he has a preference for outdoor recreation, an SUV, and Macy's, and places that are "somewhat off the beaten path" and "edgy". The visitor has used Yelp.com, TripAdvisor.com, and Facebook.com, travel guide books, self-guided walking or driving tour, cell phone audio tours and has a smart phone he has used on visits to destinations, but has not scanned QR codes. He is age 35-44 with income between \$100,000 and \$150,000, male, Hispanic, and has a graduate degree.*

As we described in the survey analysis, Aspiring Contemporaries is a segment present across ASNSB visitors. The segment can serve as an "anchor" for marketing the Byway in that its lifestyle choices are similar to several other Mosaic segments and visitor types. Additionally, some socioeconomically lower-rung segments, who also visit the Byway, may look to Aspiring Contemporaries as people they seek to emulate – at least in certain aspects of their lifestyle.

### **More about the "Aspiring Contemporaries" segment**

Aspiring Contemporaries are the "anchor" segment for visitors to ASNSB sites. They are described by Experian/Mosaic USA as:

*"The households in this group are filled with upward strivers, overwhelmingly dominated by younger, mostly unattached residents (GenXers, Millennials) and a population that is ethnically diverse. Typically about two-thirds of the adult population are single or are divorced.) While not as affluent as some of their neighbors, these households tend to be solidly middle-class, residing in newer homes and apartments valued at more than the national average, usually a sign of upward mobility. These young, active householders are culture buffs who like to go to see plays, movies, comics and live bands. They spend a lot of their discretionary income on the latest fashions and on consumer electronics. They are also heavy media users, listening to jazz on the radio and reading the Sunday paper for science and technology news. Raised on technology, they are extremely technology savvy and spend much of their leisure time online doing virtually everything."*

We interviewed two visitors who, based on their survey responses and place of residence, fit the Aspiring Contemporaries segment: one who had visited Debs Park and another who had visited the Craft and Folk Art Museum.

Both visitors in this cohort were between the ages of 35 and 44 with income above \$75,000 and were college educated – one with a bachelor's degree and one with a graduate degree. Both were visiting the sites where they were surveyed deliberately (they didn't happen upon them). Both self-describe as being primarily interested in visiting places that are "off the beaten path" or "edgy." The following quotations, transcribed from the interviews, provide a sense of their preferences, their awareness of the Parkway, and how they gather information.

### Reasons for Visiting:

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"I usually visit the parks in the area because I work with little children. We first came as a group of teachers and directors to see the park and **take a hike** there to see if it would be a good place for our group of **children** (ages 2-6)."-Debs Park

"With the group of children I brought there we took an amazing hike in the park. It was amazing because the group is pretty young and they sometimes have difficulty with being out of control and respecting nature. They **can be loud in the park** and try to pick plants and stuff. We got to walk so quietly that two rabbits came up to us and we were able to watch them for a long time. Imagine a group of pre-schoolers! We agreed to a secret code of a little tap of two fingers on the shoulder if you see something you want to show others."-Debs Park

"I went to CFAM as part of an art walk."-CFAM

### Awareness:

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"I have heard of the Arroyo Seco Parkway...is it a place to hike? Is there a bridge there? I don't remember names and I usually **go on hikes** on my own on the weekends around Los Angeles."-Debs Park

"Artists who have places to visit don't think about marketing. They have the best of intentions but someone needs to help them with cheap, easy, low-cost ways to **tell people about the amazing things there are to do.**" CFAM

### Sources of Information

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"My husband usually **looks for the information on the computer**, but I use a book called Take a Hike for the LA area – hike within 2 hours of the city."-Debs Park

"People who are the target audience for the smaller types of cultural sites that are in the neighborhoods of the Arroyo Seco area tend to get their information from the **small community papers** like Leimert Park Beat, Culver City Times, and Echo Park online. They are real **locavores.**"-CFAM

“The websites I have visited for places like the Gamble House are almost **always out of date and out-dated**. There’s nothing there that shows me that it would be an interesting experience! I’ve been there and I’ve been to an art walk over there and it’s amazing. But the website makes it seem like it would be the most boring thing and looks like something you would see in a local paper from 50 years ago.”-CFAM

#### **Other Site Visitation/Cross Promotions**

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“Arroyo Foothills is trying to preserve hikes and I’m going to look for those hikes around that are **kind of hidden**. They used to not be accessible to the public but now people can use them. I prefer to go to places that are a more **secret** when I go hiking with my husband where there are **less people**. But when we go with children there are some limitations to what kind of hike you can use. You have to have a bathroom; they often have to go, and also safety is an issue. You don’t want to go to a narrow one where there are edges.”-Debs Park

“When we go to the park with children we don’t really do anything else because children can only handle short visits so they don’t get overwhelmed. **When I go on my own I like to visit what is around and especially the gift shops in the parks**. They are better than conventional stores and have more **unique** items and natural colors.”-Debs Park

#### **Encouraging Visitation**

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“Highland Park art show is interesting, but it’s **not known as a destination**. It’s not the kind of place you’ll just say – hey, let’s go walk around Highland Park. But if you have some **guideposts** that’s a start. The discovery is part of the fun, but you have to have some sense of what’s going on there and where to go. You can go to a lot of **artist lofts and studios** and the people are all really nice, but there is no clear **information on how to get around**. It’s not really fun as a car event, but it could be a really great bike event. They should consider partnering with something like the LA Bicycle Coalition. They could bring so many people through the area who would bike from place to place. They’d probably put video about it up on their website.”-CFAM

“People in Highland Park need to stop making it like an **exclusive club** to be a backer or supporter. There are always so many rules. If you want to be successful you can **get people who live in the local neighborhoods** there who are always looking for fun stuff to do and they would

be your biggest supporters! If they live near you they are usually willing to do things to help for free.”-CFAM

### Visitor Types

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“For getting the word out you really need to look at models like the **Renegade Craft Fair** (<http://www.renegadecraft.com/los-angeles>) which takes place in the LASHP and **Patchwork** in Long Beach (<http://www.patchworkshow.com>). These are the people who would visit arts and cultural places if they just knew about them and what they offer.”-CFAM

“People like me and those who go to these **indie and DIY** crafts events are basically age 18 to 30 and they are all **interested in buying locally** and support small vendors and places. These are the kinds of experiences they want. They might live in a particular neighborhood and read about their local things but they are also out **exploring other neighborhoods** and are interested in doing that.”-CFAM

### Technology and Social Media

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“There needs to be **promotions** for destinations that would get people there in the **afternoons with links** to restaurants or concerts where people can go spend an hour or so like at the art walk and then do something else in the local neighborhood. I’m a hyper-local person and there are a lot of promotional opportunities for things like this through **social networking media**.”-CFAM

“Are sites in this area even putting **video and pictures up on Facebook**? If you get people who enjoy the places to create the buzz they will be doing your promotion. They need to **create a community of friends** and look at how other successful ventures are doing it. The best strategy would be to combine some traditional paid placements with solid social media.”-CFAM

Visitor 1:

*Drove to CFAM and visited as part of a scheduled art walk. In conjunction with the visit she also went to LACMA. She has been to El Pueblo, Heritage Square, Lummis Home, Old Mission District, Huntington, Norton Simon Museum, and Old Pasadena. She has never heard of Debs Park, Galco's, Sycamore Grove Park, or Meridian Iron Works Museum. She has driven on the Arroyo Seco Parkway, but had little familiarity with its history. On the proxy questions preference for theme parks, luxury sedans, Macy's, and places that are "well-known" and "somewhat off the beaten path". Has used Yelp, TripAdvisor, Facebook, travel guide books, cell phone audio tours and has a smart phone that is used to support visits to destinations including QR codes. Visitor is over age 65 with income between \$50,000 and \$75,000, female, white, and has a bachelor's degree.*

Visitor 2:

*Drove to the Gamble house with visiting dignitaries. On the visit they also drove past a historic court house, visited the Norton Simon Museum, the Huntington gardens and had lunch at the Langham Hotel. This visitor has been to Chinatown, El Pueblo, Union Station, Heritage Square, Lummis Home, Old Mission District, Gamble House, Huntington, Norton Simon Museum, Old Pasadena, and the Asia Pacific Museum. He has never heard of Debs Park, Galco's, Sycamore Grove Park, or Meridian Iron Works Museum. He has driven on the Arroyo Seco Parkway and is aware of a number of markers on the corridor. Preference was for places that are "somewhat off the beaten path" and "edgy" on the proxy questions. Visitor has used TripAdvisor and LonelyPlanet as well as travel guide books, self-guided tours, and has listened to a podcast. He uses a smart phone to support visits to destinations but does not use QR codes. This visitor is over age 65, male, and has a graduate degree. Income is not reported.*

## **More about the "Affluent Suburbia" & "Upscale America"**

"Affluent Suburbia" and "Upscale America" are "piggyback" segments that look to Aspiring Contemporaries as style leaders. They are defined by Experian/Mosaic USA as:

*Affluent Suburbia: "Households in this group comprise the wealthiest households in the nation and they typically outrank all of the other MOSAIC types in income, home value, and educational achievement. They are concentrated in suburban neighborhoods that are predominantly Caucasian, well-educated and filled with Baby Boomers and their children. Typically workers in this group are in managerial and executive positions that pay six-figure incomes and they live "the good life" in fashionable houses outfitted with the latest technology. Luxury cars, country clubs, international and domestic travel, and expensive recreation (golfing, sailing, skiing) are part of their lifestyle. Householders in this group tend to be very active culturally, including visits to museums, art shows, and attendance at theater, dance, and music performances at high rates. Their media and purchasing behavior reflects their interests in money management, travel, technology, and gourmet foods."*

Local benchmarks for this group within a 10-mile radius of the Byway Corridor are:

- Caucasian: 73%
- Hispanic origin: 19%
- Median age: 43
- Median household income: \$89,040
- College degree: 31%
- Graduate degree: 21%

*Upscale America: "Similar to Affluent Suburbia (slightly less affluent, less educated, younger, and more racially diverse, this group is mainly Caucasian, college-educated and mostly families living in the metropolitan sprawl of major cities. Most workers in these households are in white-collar jobs as executives or work in a professional capacity earning upscale incomes that provide for large homes and comfortable lifestyles. They like to spend their spare time recreationally – getting exercise through jogging, biking, and swimming, for example. They are in-fashion shoppers and buy a lot of high-tech gadgets. Civic and community involvement is important to them and they are typically active in community affairs as members of neighborhood associations, business clubs, environmental groups, and arts associations. They are selected in*

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*Visitor 3:*

*Drove to the Gamble House and visited in conjunction with lunch at the local In-and-Out Burger. She also visited the Frank Lloyd Wright Home, Norton Simon Museum and shopped on Colorado Street. This visitor has been to Union Station, Old Mission District, Gamble House, the Huntington, the Norton Simon Museum, and Old Pasadena. Visitor has never heard of Chinatown, Heritage Square, Galco's, Lummis Home, Sycamore Grove Park, or Meridian Iron Works Museum. She has driven on the Arroyo Seco Parkway. On the proxy questions, her preference is for outdoor recreation, an SUV, and Nordstrom, and places that are "somewhat off the beaten path". She has used Yelp.com, TripAdvisor.com, Fodors.com, and Lonely Planet books as well as other travel guides, self-guided tours, cell phone tours, and podcasts with a computer and smart phone to support visits to destinations including QR codes. This visitor is age 55-64 with income between \$150,000 and \$200,000, female, white, and has a graduate degree.*

*Visitor 4:*

*This visitor was surveyed on the Metro Gold Line. She has been to Chinatown, El Pueblo, Union Station, Debs Park, Meridian Iron Works Museum, Old Mission District, Gamble House, the Huntington, the Norton Simon Museum, Old Pasadena, and the Asia Pacific Museum. She has never heard of Sycamore Grove Park. Aware of the Arroyo Seco Parkway is only as a freeway. From the proxy questions her preference is for museums or art galleries, a luxury sedan, Macy's, and places that are "somewhat off the beaten path" or "edgy". Visitor has used Yelp.com, Tripadvisor.com, Fodors.com, and Lonelyplanet.com. Also uses travel guide books and self-guided tours, but does not use social media on the smart phone. This visitor is age 45-54 with income between \$100,000 and \$150,000, female, White, and has a bachelor's degree.*

*their media choices, preferring magazines and cable TV channels that focus on business, fashion, and the arts. They are heavy and omnivorous Web users who go online for everything from banking, downloading/streaming music and video, and buying merchandise."*

Local benchmarks for this group within a 10-mile radius of the Byway Corridor are:

- Caucasian: 58%
- Hispanic origin: 38%
- Median age: 38
- Median household income: \$57,235
- College degree: 21%
- Graduate degree: 9%

All visitors interviewed in this cohort were older than those in the Aspiring Contemporaries group. Education was high – two have bachelor's degrees and two have graduate degrees. Income is mixed, but skews higher with two reporting income over \$100,000. All were visiting the sites where they were interviewed deliberately (they didn't happen upon them). Two were visitors of the Gamble House, one was a passenger on the Metro Gold Line, and one was visiting CFAM. All self-describe as being primarily interested in visiting places that are "off the beaten path" or "well-known and established" with a few indicating interest in "edgy" sites.

#### Reasons for Visiting:

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"I went to CFAM as part of the Wilshire art walk with a friend. I've only been there the one time, but I have known about it. **My friend invited me** to go with her on the art walk."-CFAM

"I'm the honoraria consul for Estonia in California so my visit to Gamble House was **both pleasure and business**. I had the Consul General from New York here on business but they had some free time so I was showing them around. I thought the Gamble House would be a **good place to take them**." -Gamble House

"I chose to take my guests to the Gamble House because I have written a guide book to L.A. originally for the L.A. Consular Corps and the City of L.A. is now using it as a gift for visiting dignitaries (A Diplomatic Guide to Los Angeles) so I'm kind of curious about a lot of places in L.A., but the Gamble House in particular because it was **convenient** to where I was taking them

through Pasadena. The Gamble House is just very **distinctive**. Visually it has an impact and it's something that they wouldn't see on the east coast. That's why we ended up there." -Gamble House

"What got me to the Gamble House was that for a while I lived in the condos across the street and I used to go there all the time. I **love that area**, so when we come back to visit about once a year we try to go over that direction and visit again. I just love the spot. We visited for a pleasure trip."-Gamble House

"We love that original **In-and-Out Burger** that is near the **Gamble House**. So we decided while we are there we'll go park and go walk around the area and see if we can get into Gamble House."-Gamble House

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#### **Awareness:**

"When I think of the Arroyo Seco Parkway **it's kind of...edgy**...and a lot of the studios are in industrial areas. And a lot of other studio and things are in homes or behind homes. It's an interesting mix. I'm thinking of that area and it is long so **it has a mix**. We rarely visit anything on the Pasadena side. We don't use the Gold Line as a rule."-CFAM

"When I think of the Arroyo Seco Parkway I think about **driving on the 10** when you go across the **bridge** and the Pasadena area is on your left and I think of the freeway going through that area."-Gamble House

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#### **Other Site Visitation/Cross Promotions:**

"I've been a few times to those **Arroyo art studios** and homes where you tour around in your car to the art studios. It's in the Arroyo area."-CFAM

"If I added sites onto that visit with my guests I might choose the **Norton Simon Museum**, but in the same category as the Gamble House I drove them past the building where the **Ninth Circuit Court of Appeals** sits (Chambers Court of Appeals Building). Most people don't know about it, but it's a fascinating combination of a working court house in an **historic building**. There is a **great view** of one of the Arroyo Seco bridges from that location. Where I didn't take them was the Faynes Mansion and Finnish Folk Art Museum which is very close, but I didn't take them to

the mansion because the hours are so limited and it's hard to get in. The museum really isn't of interest to anyone unless they live in the Pasadena area; it has a lot of good historical information about Pasadena, but for someone from the east coast coming in it probably gets kind of boring. You have to go inside to appreciate it. I also took them to the **Rose Bowl**. We didn't shop anywhere, but we ate at the **Langham Hotel** and we went to the **Huntington Gardens**." -Gamble House

"I would take people through the Pasadena Freeway from downtown to Pasadena simply because it goes through the Arroyo Seco. **South Pasadena** is an interesting area to go through. The **Southwest Museum** used to be around there, but I think they merged with the Autrey, so that is something that would cross my mind, but I would Google it first. If they have kids I would take them to the **Kids Space Children's Museum** by the Rose Bowl; that's a good place to go. Also the **Art Center** at the College of Design which is right above the Rose Bowl." -Gamble House

"I **often do outdoor activities when I visit cultural sites**. Of course the Getty Center is perfect for that and now they are letting people spread out blankets on their grounds and have **picnics** there. Any museum that has gardens, like the Huntington, you don't even have to go in their museum if you don't want to. They have these fabulous gardens you could **spend all day walking around** in. I like to do that. It's a bonus, I think." -CFAM

"I have been to the **Gamble House** in the past year, but I drove there. I took the Metro once to the **downtown art walk** because the parking is so expensive in downtown LA." -CFAM

"Cultural outings along the Arroyo Seco corridor would be very exciting. I love that kind of thing. I would **rather go to places I rarely go** to than the ones I go to all the time. It's just the discovery part is hard, but it's fun. You can do an art tour just on the Metro Line. They have different kinds of artwork in every station and they actually do have tours of that. I've taken that on a Saturday morning." -CFAM

"When we went to Gamble House we also walked up to the **Frank Lloyd Wright house** because I know where that is. We also went to **Norton Simon** and we drove by the **Wrigley Mansion** and we went up and down **Colorado Boulevard**. The **Apple Store** is there so we went there. It's the

main drag through Pasadena. It's got the cute little shops and is down from Norton Simon." - Gamble House

"The outdoor activities we did on our trip when we visited **Gamble House** included **walking on the beach** and we took a **hike in Malibu Canyon**. We are pretty cheap so for food we tend to eat at **happy hours**. We ate at the Redondo Pier and we had **ice cream cones in Pasadena** and the In-and-Out Burger. We **shopped in Pasadena** and I bought my daughter a necklace in the **Tiffany** store that is there." -Gamble House

"As far as place to visit along the Gold Line I would definitely recommend **Old Town Pasadena, Chinatown, Union Station** which includes the **new Mexican American Museum** and a very nice **Chinese American Museum**. Union Station itself is of cultural interest and there are restaurants in the area that are of interest. I haven't done this yet myself, but I think there is a branch of **MOCA** that you can access by getting off at the Little Tokyo stop. We've been meaning to take the Gold Line out east to eat **Mexican food** in an area that I had read an article about in Sunset magazine. It was about Mexican food in East LA." -Gold Line

#### Sources of Information

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"I usually look for information in the Art & Books Section of the **LA Times** on Sunday. Almost everything is in there."-CFAM

"When I'm visiting a place I usually just go on line and **Google** the city and museums and you come up with everything you need. If all the information isn't there I will call. I don't really use apps for that. But I did use a smart phone the other day at the Annenberg Museum of Photography and they have the scan thing (QR) and I have a scan app on my phone. All you have to do is scan it and out comes all this information that you used to have to rent an audio tour for. It's the same stuff."-CFAM

"To retrace how I did the book was to make a list of places I knew of, but then I used **word of mouth** and just talked to people and heard about places I'd never heard of before. After I had a list I would go on the **internet** to research them. These are my two primary sources. There is not a section in the book that is specific to the Arroyo Seco area, but there is a Pasadena Tour section. [Other sites listed on the Pasadena Tour for Diplomats includes: **LA County Arboretum**

**& Botanical Garden, Santa Anita Park, The Huntington Library, Art Collections, and Botanical Gardens, The Langham Huntington Hotel & Spa, California Institute of Technology, Ice House Comedy Club, Pasadena Playhouse, Pacific Asia Museum, Occidental College, Richard H. Chambers U.S. Court of Appeals, Norton Simon Museum of Art, Fenyes Mansion and Finnish Folk Art Museum, Gamble House, Rose Bowl, Kidspace Children’s Museum, Art Center College of Design, Jet Propulsion Laboratory, and Descanso Gardens.” -Gamble House**

“We **looked on line** at the Gamble House site to see what the hours were and that sort of stuff. When we are going on a cultural outing we do **lots of research on the internet.**”-Gamble House

#### **Encouraging Visitation:**

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“I was able to meet the Director on my visit to CFAM and she said she’d be willing to do a program for my university women’s group to come to the museum for a tour. They are going to have a **wine and cheese tasting** there that night so that will be neat.”-CFAM

“I don’t think enough people are aware of the Arroyo Seco area and all of the things that are available over there. People think it’s 10,000 miles from downtown or where they are. But time wise from downtown **it is really easy to get to.**” -Gamble House

“One of the reasons we decided to move to South Pasadena was because of the Gold Line. But we don’t live really close. We are about a 20-30 minute walk to the station. We have taken it to go have a meal in **Chinatown**. I have taken my son on the Gold Line to go to **Chinese New Year Festival** and **to Union Station to take a look around** and go to various museums downtown. My husband and I have taken it to get to Hollywood and to meet friends for **dinner in Little Tokyo** and to have **dinner in Old Town Pasadena**. We do these things but not on a more regular basis. When we moved here **there was a free shuttle system** that was part of the city and that has been discontinued because of budget cuts. For the city of South Pasadena they have existing shuttle vans that they’ve already purchased and they have a staff that use them, but right now they are just using them to give seniors a ride, where in the past it was open to anyone. It’s been fairly controversial and I was quite upset about it. I was using that to bring my son to preschool and I can’t do that now.” –Gold Line

"I think the Gold Line is **resource for families**. I have a four-year-old and my son loves taking the Gold Line. I'm surprised more families don't take advantage of it. I think they would if they knew more about all of the things they could do. I have liked the little **destination guides** about the Gold Line but I think there could be more different ones – maybe one for just families with children." –Gold Line

"We subscribe to the **LA Times** and to **Sunset Magazine**. When I hear of things I do go online. I think the LA Metro Transit website leaves a lot to be desired. It's very hard to use. That destination guide prints out in very tiny writing and it's really a shame. What I'd really like is to be able to more easily plan a trip with public transit by finding a site where I could explain what I'm looking for and get some suggestions. **I had to really dig deep and didn't find too much**. But if there were some **better guides or websites** it would be useful I think I would take advantage of it." –Gold Line

#### **Visitor Types:**

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"I would recommend an experience like the CFAM to people who aren't necessarily in the art world. I think people who go to the theater and who read books are probably the people I would recommend it to because they like to **expand their horizons**."-CFAM

"I like to visit **a little of both** – places that are well established, like the Huntington, but also some that are off-the-beaten-path so to speak. These would be places like all those **little studios** around the CFAM, like in little alleys almost. They are just hard to find. I would surely explore these kinds of places in other parts of the city. I just recently did the LA downtown art walk. My gosh, that is tremendously successful. It's the third Thursday of every month. All in these little bitty places."-CFAM

"When I think of places that are off the beaten path it means to me that I'd rather go to places like the **Gamble House** than to the Getty. We also do a lot of **camping**, so we tend to go not to the great big places, but the places that are smaller, that are getaways. Like when we went to Africa, we went to some of the tiny little villages that were **way out**. Being in a major city with all the **crowds** is not my favorite thing to do." -Gamble House

"I think the people who would be interested in the Gamble House would be anyone who is **interested in art or architecture**, but also anybody who is looking for a **place that is a refuge** in the L.A. area to walk. Those **neighborhoods are great places to walk around** in. Somebody who would enjoy kind of a **quieter** place with **gorgeous** furnishings. It would appeal to someone who is **college educated**. I've had friends go visit there on our recommendation and they were people who aren't really into the big museums, but tend to like seeing cultural things that are **easily available** and that one is." -Gamble House

"We bought a book and some stuff at Norton Simon and post cards at Gamble House. We were flying with carry-on luggage so we weren't buying much. **We flew into L.A. but we didn't spend much time actually in L.A. We try to avoid it.** I don't know what the Gold Line is. We read about it being there and that's great, but **we don't take the train.**" -Gamble House

"An example of a place that is **off the beaten place** we went and really enjoyed was when we went on a **rafting trip in the Grand Canyon**. We had friends who had done it and that's why we went. We just did research about it on the internet and looked at all of the different outfitters and compared them and **looked at the reviews**. What I liked best about the experience was that you were **away from just about everything.**" -Gamble House

"I mentioned these places [**Chinatown, Union Station, Little Tokyo, Old Pasadena, East LA**] because these are the types of things I like to do. I like to visit the kinds of places that are more toward **edgy or off the beaten path**. I don't think a lot of people would want to go to East LA to eat Mexican folk food in a hole in the wall. But then there are other places that I would like to go that are more **conventional** like the **Pacific Asian Museum** in Pasadena that is really a much more conservative cultural center. **I'm interested in both.**" -Gold Line

### Technology and Social Media

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"I was **really excited when I found that QR code** had all that information and I told all the people I was with. It seemed like the same kind of information you would get with an audio tour. I liked it. It was exciting I thought! And you didn't have to turn in your driver's license to get the machine to use. All that rigmarole. If you had an iPhone and a headset you'd be fine."- CFAM

**"I don't use Twitter.** I'm on **Facebook** and I use that with friends, but that's not how I get information. I'll just go to *Google* and put in the area I want to go to and just start sifting through websites to see what looks interesting. I do use my smart phone sometimes. I've got a ton of Apps on my phone like flight apps and the ones that have the restaurant reviews like Yelp and Map Quest and Gate Guru, Alaska Air, FlightBoard, and Flight Tracker. I like to use these tools but if it is somewhere I have never been before I would probably get a **Lonely Planet** or something. But other than that I tend to use the internet to get information including **Rick Steve's podcast**. I use those." -Gamble House

"I'm sort of an information hound, but I am 46 so I'm **not part of the social media craze**. I have a smart phone but **I don't use Twitter or the newer technologies**."-Gold Line

Visitor 1:

*This visitor drove to Galco's specifically to buy products and to hang out in the area. She has been to Chinatown, El Pueblo, Union Station, Debs Park, Heritage Square, the Lummis Home, Sycamore Grove Park, Meridian Iron Works Museum, Old Mission District, Gamble House, the Huntington, the Norton Simon Museum, Old Pasadena, and the Asia Pacific Museum and was familiar with all of the sites on the survey. She has driven on the Arroyo Seco Parkway and has a preference for shopping and dining in the area, an SUV, Macy's, and visiting places of all kinds. This visitor has used Yelp.com and TripAdvisor, and listened to a cell phone audio guide and scanned QR codes on a smart phone. This visitor is age 25-34 with income between \$15,000 and \$25,000, female, Hispanic, and has a high school degree.*

Visitor 2:

*This visitor drove to the Gamble House and visited because of a general interest in architecture and visited the Huntington in conjunction with the trip. He has also visited Chinatown, El Pueblo, Union Station, Debs Park, Old Mission District, Gamble House, the Huntington, and Old Pasadena. This visitor has never heard of Meridian Iron Works Museum. He has driven on the Arroyo Seco Parkway and is aware of its historical aspects. His preference was for outdoor recreation, a luxury sedan, Nordstrom, and places that are "established" or "somewhat off the beaten path." This visitor has used Yelp.com, TripAdvisor.com, LonelyPlanet.com and Facebook.com, travel guide books, self-guided walking or driving tour, but not cell phone audio tours or podcasts. He has a smart phone that is used to support visits to destinations, but has not scanned QR codes. This visitor is age 35-44 with income between \$50,000 and \$75,000, male, white, and has a bachelor's degree.*

## **More about "Blue Collar Backbone" segment**

Like the Affluent Suburbia and Upscale America segments (above), "Blue Collar Backbone" is a "piggyback" segment that looks to Aspiring Contemporaries as style leaders – and people "on the next rung up" whom they might like to emulate. Blue Collar Backbone is defined by Experian/Mosaic USA as:

*"This group is a bastion of blue-collar diversity and is polarized with regard to age having high concentrations of very old and very young residents, Caucasians and populations of color, families and singles, and homeowners and apartment dwellers. Most residents live in older outlying towns and cities and work at jobs in manufacturing, construction and retail. Lifestyle reflects a working-class sensibility with popular leisure activities including baseball, soccer, fishing, and woodworking. Adults in these households are more likely to go out to a club than to attend a concert or a play and they do not typically have high indexing for museum visitation. These budget-conscious households shop at discount clothing stores and department stores, and they have low rates for buying investments or insurance. This is a strong market for traditional media. Residents like to watch soaps and game shows on TV, listen to country radio or to urban contemporary based on their urban or rural locales and they read a variety of outdoor and women's magazines."*

Local benchmarks for this group within a 10-mile radius of the Byway Corridor are:

- Caucasian: 62%
- Hispanic origin: 71%
- Median age: 34
- Median household income: \$46,722
- College degree: 16%
- Graduate degree: 8%

Visitors we interviewed in this cohort spanned age groups, including people under age 35 and over age 65. Only one has a graduate degree. Income is mixed, but skews higher with two reporting income under \$25,000. Two were surveyed on the Metro Gold line, and the others were surveyed at Galco's, the Gamble House, and Heritage Square. All self-describe as being interested in visiting places for a variety of experiences, but skew toward seeing themselves as people who prefer sites that are "off the beaten path." This might be considered a "Lonely

*Visitor 3:*

*This visitor drove to Heritage Square to check it out and shopped in conjunction with the visit. He has also been to Chinatown, El Pueblo, Union Station, Debs Park, Galco's, the Lummis Home, Gamble House, the Huntington, the Norton Simon Museum, Old Pasadena, and the Asia Pacific Museum. This visitor has never heard of Sycamore Grove Park, Meridian Iron Works Museum, or the Old Mission District. He is aware of the Arroyo Seco Parkway and much of its history. From the proxy questions his preference is for theme parks, a minivan, Macy's and places that are "somewhat off the beaten path" or "edgy." Visitor has used Yelp, Tripadvisor, Fodors.com, Lonelyplanet.com and Facebook as well as travel guide books, self-guided tours, cell phone audio guide. He does not use a smart phone. This visitor is age 55-64 with income over \$200,000, male, Asian, and has a graduate degree.*

*Visitor 4:*

*This visitor was surveyed on the Metro Gold Line and lives in Highland Park. She was taking the train to a café to study. This visitor has been to Chinatown, Galco's, the Lummis Home, Old Mission District, the Huntington, the Norton Simon Museum, and Old Pasadena. She has never heard of El Pueblo and Debs Park. This visitor is aware of the Arroyo Seco Parkway and some of its history. From the proxy questions her preference is for museums and art galleries, luxury sedans, Nordstrom and places of all types. Visitor has used Yelp.com and Facebook.com as well as travel guide books, self-guided tours, cell phone audio guide and podcasts on a smart phone. This visitor is under age 25 with income under \$15,000, female, White, and has a bachelor's degree.*

Planet" and "Rough Guide" market, although some visit more established sites such as the Huntington with friends or family visiting the area.

#### Reasons for Visit:

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"When I took the survey it was my second time at Galco's. I know it used to be a Trader Joe's, then I heard that they have a lot of variety of drinks and stuff like that. So I **wanted to check it out and hang out in the area**. What kind of sodas and waters they have. A family member told me about it because they had bought some kind of soda from them. They have all these different kinds of **selections that you can't really find in regular stores**." -Galco's

"I visited the Gamble for pleasure. I don't know how I first heard of the Gamble House, but I have lived in the area for three or four years. I had been there before and my mom was in town and she's interested in **architectural** stuff so I thought it would be a **good mom activity**." -Gamble House

"I decided to go to Heritage Square because I had a **mental health day from work** and I know someone who lives in that area. I didn't actually get to see her, but when I was over in that area I decided to go myself, kind of on whim." -Heritage Square

"I live in Highland Park about two blocks away from the Metro station. I don't use the Gold Line all that much because I'm working in Santa Monica right now. I'm out of the neighborhood three days week. But on the weekends I do **use it a lot to go to Pasadena**. I used to go to Arts Center so I'm pretty comfortable in Pasadena and I like to spend time there." -Gold Line

"The only time I get to be a tourist in LA is when friends or family come to town. At that time I want to show them things that are kind of **off the beaten path** or exciting or something that they'll remember. Sometimes that's a range starting with what type of food do they want to try and other times it's kind of more **quirky museums** or **bookstores**. My dad came to visit about a month ago and we went to Chinatown to go to this bookstore called **Ooga Booga** which is mostly art books. He's kind of an art guy and that was a quirky thing to do, so we decided to **go to a café** and then **try the bookstore** and then **try the galleries**." -Gold Line-Blue Collar Backbone

*Visitor 5:*

*This visitor was surveyed on the Metro Gold Line and lives in Highland Park. He has been to Chinatown, El Pueblo, Union Station, Debs Park, Galco's, Sycamore Grove Park, Old Mission District, Old Pasadena. This visitor has never heard of the Lummis Home, Meridian Iron Works Museum, the Gamble House, the Huntington, the Norton Simon Museum, or the Asia Pacific Museum. He is aware of the Arroyo Seco Parkway and some of its history. From the proxy questions his preference is for outdoor recreation, luxury sedans, Nordstrom and places of all types. This visitor has used Yelp.com, Lonelyplanet.com and Facebook.com as well as travel guide books, self-guided tours, cell phone audio guide and podcasts on a smart phone. This visitor is age 25-34 with income between \$35,000 and \$50,000, male, White, and has a bachelor's degree.*

**Awareness:**

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"I associate the Arroyo Seco Parkway with the Freeway. The **10 freeway** you can get all the way to Pasadena. I know it has been there for a long time, but I don't know the history."-Galco's

"The Arroyo Seco Parkway is basically a daily commute, but it is **historic**. For better or for worse it was built a long time ago. It's very **scenic**, but it's very dangerous because of the curves and it's tricky to drive. It's beautiful and very southern California, scenic. The integration of the freeway and the **neighborhoods**, and you have a **distant view of the mountains** when you're driving north, and **view of downtown** when you're driving south. Definitely some good views from the parkway when you're driving." -Gamble House

"The Arroyo Seco is one of the more **historic areas** of Los Angeles. I know that it runs through and along the Heritage Square sites, but I don't know where it starts. It was also where the **first freeway** in the United States was built, back the Forties I believe." -Heritage Square

"I'm originally from San Francisco, but I've been here for a number of years. When you grow up in San Francisco you're not taught to think very nice things about Los Angeles in terms of history. When I came here I was actually **surprised that there were areas like Angelino Heights** that survived the wrecking ball and I think it was some old publication that listed Heritage Square as one of the **architectural highlights** to visit. It was referred to like an architectural petting zoo. I was always intrigued by it, but I didn't have a chance to actually visit until a few years ago. This year was the first time I actually had a tour." -Heritage Square

"The tourist situations I would like to be in are like **learning things about neighborhoods**. That's pretty **exciting and interesting**. Even in the corridor we are talking about, along the Arroyo, that's got some pretty **substantial history** in terms of the history of southern California. I don't know how it got settled by I do know that the San Gabriel Valley was called the Valley of the Smoke by indigenous people in terms of what kind of weather systems we have. That's interesting to me." -Gold Line

"I know about the Arroyo Seco Parkway because I happen to live along it. Just by being there and snooping around I have been able to find out about some of the facilities it offers. There's a

**bike path along the actual river** that I never would have known had I not sought out to explore my neighborhood.” -Gold Line

#### Sources of Information:

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“When I’m trying to research someplace to go I would usually go to Yelp. They have really good reviews and pictures and stuff like that. The **pictures are really important** to be able to see what it’s like.”-Galco’s

“When my wife and I go on a trip we generally do a lot of **online research** in general. If I’m going out of the U.S. I’ll get a **guidebook**, but in the country I’ll usually just use **Google** and see what pops up. Certainly **Yelp.com**.” -Gamble House

“Locally for cultural information I use **LA Weekly’s website** or **LAist.com** I’ll check that site occasionally. It’s a bit more newsy than it is about activities.-Gamble House.

“Usually **word of mouth** is how I hear about places that are off the beaten path – somebody will go there and tell you about it. My wife is a yoga teacher and a semi public figure so she has a lot of students who are always telling her about stuff. So, the community of yoga people is one source of information for us. Mostly word of mouth. Sometimes **LA Weekly** will have stuff, **interesting new places you want to go**. I used to be more into reading the LA Weekly almost religiously every week, but I haven’t really been reading it regularly in the last few years, but I will go to the website if I want to look for something.” -Gamble House-Blue Collar Backbone

“I would say that the types of places on the Arroyo Seco might be promoted in the virtual world in places like the **Huffington Post**. I do read that quite a bit and they do have an LA page and I’m sure you can put ads there. Also for visibility there could be more **signage** somehow.” -Gamble House

“As long as all of these sites **show up well in Google searches** and on **Google maps**, that’s probably the best thing for them to do. That’s a place to start. I love Google maps.” -Gamble House

"I don't take the Gold Line in and out of the city very much. I have, but you could **advertise along the Gold Line route**. I would think that people who do take the Gold Line every day are aware of these places because they pass them every day, but maybe not. That would be an obvious place to market. The public transportation in LA is generally more viable, but most people in LA only take public transportation because they can't afford to have a car. So it's a class issue. You can't even buy a bus pass except for at like a check cashing place. It's really an **economic divide** there. On the Gold Line you probably have some upper level people because it connects to Pasadena. There is increasing awareness of getting out of a car and onto a bike because of environmental reasons. People would take the Gold Line for a special event downtown so they don't have to drive home drunk." -Gamble House

"My favorite visitor guide is the **Rough Guide**. I like **Frommer's** and also **Time Out**. **ExperienceLA.com** is the number one place I send friends who are coming in from out of town. I send them there first. You should definitely have all of the events and sites in that area listed there. I think you can do it for free and any promotions you have like two-for-one admissions should be on there. They are very big into promotions like those – or free days." -Heritage Square

"Most of the research I do about places I visit is by **hopping on gallery websites**, those are really the only types of outings I go on regularly. I will use my phone sometimes, but I'm a pretty ignorant iPhone user really. I've never done those QR codes. I do listen to podcasts. Cell phone tours I don't really use those." -Gold Line

"Before we took this tour along the Gold Line we had to do a lot of research beforehand coordinating with the individual sites to figure out the transportation options. There was always an element of discovery that is great because the Gold Line is above ground for most of its route and when you stop to walk around there are things just happening. But for some of the things it was **arduous to figure out how to get there** and how to connect. **Google Maps** is really effective because they help you with getting a timetable and integrating it into the transit options, but it would be really helpful if some of these destinations **simply had street** directions of how to get there off of transit and a map. I don't think there is any transit map just for rail transportation that overlays a city map. I can't find that. I can't plan what I'm going to do based on where transportation can take me. The **system is overwhelming**." -Gold Line

### Other Site Visitation/Cross Promotions:

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“I’m attracted to destinations like restaurants and food places. I’m really into that right now. All different kinds. Usually ones that are **different** – different pizza joints like I just found this new one called Masa in **Echo Park**. I really like the environment there. My friend had seen it on Yelp and the pizza is really good and they have a salad pizza. I just like way it is set up too. They have couches and you can like **hang out** there. They also sell pastries. It attracts Echo Park people and a lot of younger people, **Hipsters**, and a lot of Mexican people too.”-Galco’s

“A place I would consider to be **edgy** that I would be attracted to would be Masa because a lot of people don’t know about it. Or Mozza Pizzeria. I like to seek out places that most people don’t really know about (although this is a Mario Batali venture).-Galco’s

“When we went to the Gamble House we also went to **lunch in Pasadena**. We went to **Le Pain Quotidien**. We didn’t shop that day, but I have spent time with my mom **shopping in Old Pasadena**.” -Gamble House

“Other sites I’m aware of in the area are the **Lummis Home** and that area in **Highland Park**, but I haven’t been there. I’m aware that there are some other historical sites along the parkway in that particular area. Every year they do an event there. But I haven’t been over there. I guess there’s the **Southwest Museum** which I haven’t been to. I **drive by it all the time**. I don’t make a lot of time to go to museums, I wish I did, but it usually **takes having a parent or guest in town**. My wife and I both work.” -Gamble House

“**Off the beaten path** or **edgy** are the types of places I’m most interested in. I would consider **parks**, both national and state parks to be these kinds of places. We often go **hiking** when we have free time. I don’t know the names of the parks, but we hike in various places in the foothills of the Angeles Crest Forest. Or we’ll go to Joshua Tree National Park. Other parks I would go to are like **Debs Park**, which is just off the highway. I’ve only been there once actually, but I have been there.” -Gamble House

“On my visit to Heritage Square I stopped at a little **local coffee and pastry shop** somewhere on Figueroa. That day I can’t remember, but I may have combined it with a visit to the **Norton**

**Simon** where I am a member and I go to the Norton Simon about once a month. It's **easy to get there** from Pasadena." -Heritage Square

"I would describe places in the L.A. area that are **off the beaten path** are like right across the Arroyo from Heritage Square is the **Lummis House**; that's right in the area. There is also another museum near there that is like an **old Spanish style mission**. It's some kind of casa, adobe and it's even more obscure than Heritage Square but it is right there. Places in L.A. like the **Police Academy café** in **Allegiant Park** are really interesting. The Police Academy has this amazing café. It's this old building from like the Twenties and it's open to the public and in the back there is this beautiful stone grotto that is an architectural treasure. People don't really know about it, but if you live in the area you might actually know about it. It's really **fun to hang out** there in the morning for breakfast before work and hang out with all these like...cops. It's a funny kind of place. But also, heritage wise and historically, it's really kind of **fun and unusual**." -Heritage Square

"Another place is the Shili Temple –that's an example of off the beaten path and I think it is the largest Buddhist temple in the United States. So like in Highland Park there's that **Debs Regional Park** and the Audubon Center. Those are great. And there's also a place called **Elephant Hill**. These are great places to **walk your dog** and they have **beautiful views of the city** and they are like **10 minutes** at the most from downtown L.A." -Heritage Square

"I feel like the Chinatown station on the Gold Line is really wonderful. The **proximity to Chinatown** itself and all of the **art galleries** there and you have the **Homegirl Café** right there and the park that used to be **Not A Cornfield**. I think all of those things are really great destinations, like afternoons in kind of **one-stop shopping**. I feel for small outings the Gold Line really puts you in a good place for Chinatown. With the Heritage Square station I don't know the proximity to that group of houses. I only went there once and it wasn't open. Someone came out and said hello, but I haven't been able to get in there. But even seeing those **houses from the freeway – they are so enticing**." -Gold Line

"This past mother's day I went with my mother on a tour in L.A. I live in Highland Park and I met her downtown and we went to the **flower market** first thing in the morning at like 4:30am. Then we walked to this **breakfast place** that is open 24 hours downtown. Then we got on the Gold

Line at **Union Station** and took it up to the **Huntington Library** and had lunch there and then we took it back to Highland Park and had some **street food** there. Then we took it down to **Little Tokyo** and we did something in **Boyle Heights** and in **Mariachi Plaza** and had ice cream. Then we came back to **Persian Square** and had a drink at the **Biltmore** and had dinner at a downtown restaurant that we walked to. We also went to an exhibit at **LAMOCA**. It was a street art exhibit.” -Gold Line

“We also went to the **River** so we stopped at the Cyprus Station too. We connected on a little bus because we didn’t want to walk. It was the old Lowrey’s.” -Gold Line

#### **Encouraging Visitation:**

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“One thing that has been successful for corridor marketing is like the model they have in **Pasadena for their art tour**. So they have **shuttle busses** that take you from stop to stop and there are like 12 different stops. That’s something to look at as a model, to be able to connect the different locations and provide transportation on shuttle busses within like a five-mile area. Have it like an all-day affair or a weekend thing. And have shuttle transportation and get it sponsored by some businesses so that you’re not spending a lot of money. Like **play the tourist** in your own area type of thing.” -Heritage Square

“You need to **highlight stretches** within the corridor **that you can walk easily** and safely and explain what is there. Like a walking area, and then a biking area, and then perhaps a shuttle service area. I still think the shuttle thing is the best given how big the area is. **Create maps of the whole route** and if there are areas where people can get off a shuttle, or get off a metro stop, and walk a little bit have those **pop outs as smaller maps**. Maybe from one stop to another stop, have that on the map. You should have people around to assist you if you get lost.” - Heritage Square

“If you created a tour of the area you could have some of the **local bakeries and food shops** do stands to sell things along the way at different points. There are so many little local food shops. Combining it with food can be a lot of fun, and they could give out water to those who are doing the walking tours. Have a **scavenger hunt** kind of thing where you have hidden prizes at different locations and you could have that **geared toward families with kids**. So you start at

one end and if you make like four stops and you get a punch card or something you get some bigger prize. You could **create an app** for it; if you could create one it would be really good.” - Heritage Square

“I think first and foremost for some of the sites that are not exactly on the Gold Line it is important that they **publish the connecting services** and that they make connecting services available. That would be really helpful. When we went to the Huntington Library there was no connecting service to the library and it’s a little far. It’s over two miles.” -Gold Line

**“Finding information about these types of sites is the problem.** I was really limited to going to the sites I already knew about. So I would just go to the website of that destination – like the Huntington Library – and then I would look at how to get there and I would hope that they would have a transportation option. And if they didn’t **I would have to construct my own transportation itinerary** based off of the address and its sort of a **painstaking task** to figure it all out. I had to repeat that for every single location whether it was the historic Biltmore Hotel or it was an ice cream parlor at Mariachi Plaza or if it was LA MOCA. Typically I would not turn to Metro to find out and it was difficult because I don’t know if I took the most efficient route. It was a lot of work to plan that. It would have been a lot easier if these sites supported public transportation options or take it into consideration that some people may be coming from the train. Most of them were catered towards driving.” -Gold Line

“I think making information more available is going to increase the options. I really do think that **people don’t realize all of the bountiful resources** that are right there in everyone’s backyard. My feeling is that people feel very limited in their options for diversions; those who have the time to spend they think their options are limited to going to the movies or shopping. I think that has implications on public health as well. A lot of these **beautiful parks in Highland Park are underutilized**. There’s an outdoor theater, there’s a bike path. There are stables in Highland Park that no one knows about. **Once you discover it it’s kind of a cool secret to have.**” -Gold Line

“The **Highland Park Business Improvement District** would be a great organization to work with. The **Little Tokyo Community Redevelopment Office** is great. I’m a graduate student in Urban Planning at UCLA. There’s this thing called **Future Studio** and **Chicken Boy** that is art collected in Highland Park. I think the **Bike Oven** is also a Highland Park based organization that I think

would really grab onto this. It's a place where you can come in and work on your bike and learn about bike safety. Even the **Los Angeles Bicycle Coalition** would be good. They want to get people out onto the streets and that's the best way to discover these resources. That's how I found out about them. I was out on my **bike riding around exploring the cultural geography of my neighborhood** and that's where I found out about all of these things. But then when I try to find out more information about them there isn't anything. The first place I go is Google. I don't even know if the neighborhood council has a website. Maybe that's a good place to start." -Gold Line

#### Visitor Types:

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"I would recommend a place like Galco's to people who like to try different types of things. I don't want to use the word *hipsters*, but maybe more those kind of people. They like to try different things." -Galco's

"I think the Gamble House would appeal mostly to **people of any age** who are interested in **architecture** and **history**, or the history of architecture. Young and old people. I think typically people who have a **good education** and more clued into that sort of thing and have an appreciation for it, so college educated people." -Gamble House

"My attraction to **off the beaten path places** comes down to **avoiding crowds and lines** and high **cost**. So finding places that are **easy** in, easy out, and are not going to cost you an arm and a leg, or you're not going to wait all day in a line. It's also great to be exposed to something **not everybody knows about**." -Gamble House

"I think the kind of people who would be interested in visiting Heritage Square would number one be people interested in American **architecture**, but also **local history**, and the history of southern California. Also it might be interesting to **students** of 19th century American literature to see what houses from that era would look like. Even early 20<sup>th</sup> century literature like "The Magnificent Ambersons." It won a Pulitzer prize and was made into a movie by Orson Wells after he did Citizen Kane and it tells about a wealthy family from the Midwest who lived in a grand mansion. There are a number of buildings on that Heritage Square site that really **evoke that period** and what life would have been like. Here in Los Angeles, a lot of entertainment

industry professionals like interior designers, people who work on period pieces, period film also.” -Heritage Square

“I think Heritage Square would be interesting to school kids and to **families** because it is so different. Here we are in the 21<sup>st</sup> Century and people actually had to pump water in the house and go outside to go to the bathroom.” -Heritage Square

“I think a lot of **seniors** would also go crazy about the sites because a lot of people came here to California from the Midwest and back east, somewhere else. Those houses are very similar to historic buildings you would find in other parts of the country and that might **evoke memories** for a lot of older people who came from elsewhere. So it is of interest to both **young and old.**” - Heritage Square

“These sites would be interesting to a lot of **tourists** – the Metro is doing a lot more promoting of what is available on the Gold Line. They have those brochures I’ve seen with interesting cultural things to do at the various Metro stops. I know that Heritage Square is listed, but marketing to those people who are interested in promoting cultural tourism in Los Angeles. To be honest, Heritage Square, **you have to be here for a while to really know that it is there.** It doesn’t have the same kind of name cache as Griffith Park or the Observatory yet. So I think the more you can do to get **tied into other promotional efforts** the better. Tourist who have the time to spend, like on a visit of more than three days, they might actually find it really interesting.” -Heritage Square

“**Heritage Square is sort of off the beaten path** because they don’t really have much of a presence. They’re not really hooked into other institutions and they **don’t seem to advertise** themselves the way other art nonprofits might with postcards or other things. I haven’t been on their website before and I don’t know what kind of programming they have. The only thing I learned about them when we walked up was from a banner there that they are open on weekends and that it costs money to get in there.” -Gold Line

“I think **Chinatown is a mix of all types of experiences** there between Chung King Road and Broadway. There are a lot of established places there but there are a number of other galleries like in Mandarin Plaza and other **little nooks** that are more off the beaten path. The big park

that is there now – the one that used be Not A Cornfield project (**LASHP**) – on the one hand it’s pretty established because it’s a big park and people are using it and that’s great. It used to be a brownfield years ago and then someone decided to plant corn there and rejuvenate it. **Farmlab is there, and that’s edgy.** There’s a workshop that’s in the corner of that park. Farmlab is cool. They have a lot of urban farmers and bee keepers and they have meeting there. I think those are pretty interesting things to learn about and that’s off the Chinatown station.” -Gold Line

“When I lived in Boston I had a book called Car Free in Boston. Essentially it listed a bunch of cultural landmarks and destinations and how to get there without driving. Using public transit, or ride-sharing services, or walking, bike path, other ways of getting to places. It was fantastic because it was a really **great listing of places to go to that I never would have thought about.** You just see things in it and go, ‘Oh cool, I want to go there, oh I can get there so easily by....’ That’s something I think you can probably look at. I think it was coordinated by a Boston-based cartographer and some local transportation agency. They worked together to put out this guide book, but I’m sure now there is more technologically appropriate media that accomplishes the same thing.” -Gold Line

#### **Technology and Social Media:**

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I use Twitter – I will hear about things happening locally on Twitter.” -Gamble House

“It’s definitely fun to share new finds with other people. That’s where social media comes in. If I went to somewhere cool I might Tweet about it or share it on Facebook.” -Gamble House

“I don’t know if it would be hard to **design an App or a web interface that introduces the different areas and neighborhoods** with a little bit of information about them and the history. I think that the history is pretty easy to pick up on in terms of like Charles Lummis and that era and what the freeway was. I think it’s the **kind of history that people would spread to other people,** taking their visiting families to these places and being able to teach them themselves. There should be some kind of interface that can spur people to do that. Like a Did You Know That...thing. Even that the Gold Line is on the original line that the train was on. **Historical pictures are pretty cool** too in terms of showing people what was here. Visuals from then and now would be exciting. I have only lived in Highland Park for a year and I want to feel like I’m a

better neighbor and understand my neighborhood better. I think that people who ride the Gold Line do live in the neighborhood and **activating the landscape** as they go by is better than sleeping.” -Gold Line

“There was a Highland Park blog but I don’t think it was a sustainable venture for the person who was maintaining it on a volunteer basis. So that was diminished. I know there is a business improvement district there along Figueroa and they publish information about the farmer’s market. They just did a restoration of the Highland Park Theater marquee and they had a community ceremony. I think it’s called Old LA. I think they do some light marketing, but there are some coffee shops in that little community sector, but **there’s really no community center or social media presence for that locality. Highland Park doesn’t have any sort of specialized website where you can find out what’s happening.** If there was one I would be a contributor. That’s how badly we need one.” -Gold Line

Visitor 1:

*This visitor walked to the LASHP after having breakfast nearby. She doesn't do much in conjunction with park visits. She has been to Chinatown, El Pueblo, Union Station, Old Mission District, the Huntington, the Norton Simon Museum, and Old Pasadena. This visitor has never heard of Debs Park, Galco's, the Lummis Home, Sycamore Grove Park, or Meridian Iron Works Museum. She is not aware of the Arroyo Seco Parkway. From the proxy questions her preference is for museums or art galleries, Macy's and places that are "somewhat off the beaten path." Visitor has used Yelp.com, Tripadvisor.com, Fodors.com and Facebook.com and travel guide books. She is a heavy smart phone user primarily using Twitter and location-based Apps to get information. This visitor is age 25-34 with income between \$35,000 and \$50,000, female, White, and has a bachelor's degree.*

Visitor 2:

*This visitor walked to the site to take a run because she lives nearby. Only other park connected activities tend to be dining out. This visitor has been to Chinatown, Union Station, Galco's, Sycamore Grove Park, Old Mission District, the Huntington, the Norton Simon Museum, and Old Pasadena. She has never heard of El Pueblo, Debs Park, Heritage Square, the Lummis Home, Meridian Iron Works Museum, Gamble House, or the Asia Pacific Museum. Awareness of the Arroyo Seco Parkway as a free way. Preference is for outdoor recreation, a luxury sedan, Nordstrom, and places that are "somewhat off the beaten path." and "established." Visitor has used Yelp.com and Facebook.com and travel guide books and has used a smart phone to support a visit to a place. This visitor is age 25-34 with income between \$50,000 and \$75,000, female, White, and has a bachelor's degree.*

## More about "Struggling Societies" segment

"Struggling Societies" is another "piggyback" segment that looks to Aspiring Contemporaries as style leaders – and a lifestyle which they might like to emulate. Struggling Societies is defined by Experian/Mosaic USA as:

*"The household types in this group symbolize the challenges facing a significant number of economically challenged Americans. They tend to be disadvantaged and not well-educated with incomes that are half of the national average. Generally, workers in these households are consigned to low-level jobs in manufacturing, health care, and food services. Many of these residents are young, minorities, students, and single parents trying to raise families on low incomes and very tight budgets. Without much discretionary income their activities are limited and often include free entertainment, playing sports like basketball, volleyball and skateboarding. They tend to shop at discount clothing and sporting goods stores. In these households, television is the main source of entertainment, specifically reality programs, sitcoms, talk shows, and sports. Because of the strong ethnic diversity in this group, media reflects local culture often indexing high for Spanish, Mexican, and urban contemporary music."*

Local benchmarks for this group within a 10-mile radius of the Byway Corridor are:

- Caucasian: 55%
- Hispanic origin: 77%
- Median age: 32
- Median household income: \$29,354
- College degree: 11%
- Graduate degree: 5%

Visitors interviewed in this cohort were both 25-34 and were surveyed in a park. Both have bachelor's degrees and modest income. Both self-describe as being interested in visiting places that are off the beaten path and more "established".

### Reasons for Visit:

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"I moved here earlier this year and I just kind of discovered the park and it turned out to be a really **nice spot for walking or jogging**, but there isn't a whole lot to this park as opposed to

Griffith which I'll go to for a lot of different reasons like picnics, or hiking, or the observatory." - LASHP

"I go to the LAHSP because it is **really close to my house**. I'm a runner. It's more convenient than going to Griffith Park or Allegiant Park. I chose it based on location. I typically go to the other parks because it is a longer route for me to run on. I use the park more for running than anything else." -LASHP

#### **Awareness:**

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"I've never heard of the Arroyo Seco Parkway, really." -LASHP

"I'm not from California, but I think it's the 110 that goes up to Pasadena. I know **there is a river** that follows it and it's one of the **oldest roads in Los Angeles**. That's about it. My impression of it is that it's very old, but it's just a way to get from one place to another. I do have friends in Highland Park but I don't visit that area much." -LASHP

#### **Sources of Information:**

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"I tend to follow a lot of **local bloggers** that give recommendations for the kind of places I like that are **off the beaten path**. Little galleries and **little events** and things that are going on. Also **LA Times** and **LA Weekly** are really good and then I'll hear about things on **NPR** and that usually starts a chain of an online search that will lead me to something." -LASHP

"When I'm looking for something to do I usually just **ask friends**. I don't have a specific source online and I don't pick up the magazines. I **don't really read LA Weekly** or go downtown, so it's mostly word of mouth. If I'm visiting a different city I would probably just go **online** and do searches, but there's not hub I would go to. I would try to find a local news channel, like here we have **LAist.com**." -LASHP

"I have used Yelp, although I don't really use these things to search something to do. I use them if I already know about something and want to check it out. I **like to read a review** of it." -LASHP

#### **Other Site Visitation/Cross Promotions:**

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"I'm not sure where Debs Park is, so I'm not sure I've never been there or heard of it. When I do go to parks I can't say that I go to other sites when I do. I do go to other cultural places, but not at the same time." -LASHP

"When I go to the parks, I do sometimes stop at the café across the street – Nick's. I'll have breakfast there, but other than that I don't really stop anywhere else. Chinatown is very close by, but it's there's nothing for me there." -LASHP

#### **Encouraging Visitation:**

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To reach somebody like me I would suggest that places in the Arroyo Seco area make sure they have **exposure on NPR**. I'm kind of an NPR junkie and I usually do what they tell me to do. Definitely anything I hear on public radio I want to check out." -LASHP

"If there were a **guidebook** or something I would be more likely to go visit places. **It's hard to find places**. There's a really great park with a horse stable somewhere off of one of the avenues. My friend had taken me there before and you can run up and down the trails, but it's hard to find. I don't know what exit it is and it's **easy to get lost around there**. A **map** definitely would be something very useful, maybe even with some **key points** like that one restaurant in Chinatown where they filmed Rush Hour. That's a cool place. And then the **art district** that's around there. There are **some fun bars** and karaoke stuff and then in Highland Park there are so many cool places like **Figueroa Produce**. It's a great little family grocery store with amazing meats and vegetables. If those are the kinds of places you could call out in a map to kind of just **identify the cultural experience and give them the road names** so that people don't have to wander around and figure out if they are in the right place. That would help make some of these places more like destinations. -LASHP

#### **Visitor Types:**

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"I personally like the LAHSP because **I feel safe there**. It's very well maintained and I feel strangely even though there are not a lot of people there it feels like there is a *sense of community* at that park, whereas I feel Griffith Park is more golf centered and they are all spread out. And at Allegiant Park there is nothing really there, either. At LAHSP there is **always**

**something going on.** I always see people out there doing Tai Chi or doing workout programs there. Also, this park holds festivities which I think is really cool. I think there's a music festival there every year." -LASHP

"I mostly go out for **art experiences** and I go to **MOCA** and **LACMA** and the **Norton Simon Museum**. I would consider myself to be a person who likes to visit all types of places – established, off the beaten path, and edgy, because it's a more all around look at what is really going on in the world. If it's more established it's probably curated differently than some of the smaller galleries or shops that are more up and coming. **Off the beaten path we are supporting more local people. That's important to me.**" -LASHP

"If I had to describe the Arroyo Seco area and recommend it to people I would probably tell them to go to **South Pasadena** because there is a lot more going on there. Old Pasadena is a little more manufactured and you have Colorado Street with all the stores and restaurants. Going up and down along the way **it is more neighborhoody** and that's when you get into the more **cultural aspects** of the Latin culture and things like that. Unless you know where you are going, **Highland Park isn't the kind of place you just wander around.** If it's South Pasadena off of Colorado it is more established." -LASHP

#### **Technology and Social Media:**

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"I do have a smart phone and I use it. I love the Yelp app. **I use Twitter** a lot and just search with city names or neighborhood names or intersections if I'm visiting someplace out of town. I'll use Twitter a lot for that. I use the **location service on the maps** a lot to find out where I am and what's around me. I do the search nearby function. There's a really great website and App called **Urban Daddy** ([www.urbandaddy.com](http://www.urbandaddy.com)). They have a really really good App that helps you find things in your area and it **breaks it down by what you're looking for** or who you are with, how much you want to spend, what you want to do. There are **usually really good things I wouldn't have heard of otherwise.**" -LASHP

"They should also **be on Twitter**; it's really helpful. I don't really follow hashtags, they can be so specific. I do general searches for things. I follow the public radio and the LA Times Twitter account so you can get a tweet or a retweet from one of those sources. Hash tags are hard

because you have to know what you're looking for. Like last weekend I was near Union Station and I saw that there was a huge line outside so I went to Twitter and just searched Union Station and within like five seconds I found out there was a big beer festival going on. **I just search by location and figure that someone is tweeting about it.**" -LASHP

### **Interview conclusions and themes**

The qualitative interviews underscored the finding, initially identified in the surveys, that most Arroyo visitors seek experiences “off-the-beaten-path”. The interviews provided more insight into visitor preferences and a more nuanced understanding of their behaviors. The interviews allowed us to “test fit” the five most relevant Mosaic groups identified in the survey component of our research: Aspiring Contemporaries, Affluent Suburbia, Upscale America, Blue Collar Backbone, and Struggling Societies.

In addition to the Mosaic segmentation, the interviews illuminated several characteristics shared by many visitors across the sites where they were surveyed:

- Most people are not familiar with the Byway designation and many are not familiar with the “Arroyo Seco Parkway” name. They recognize that the road is older than other freeways, but they do not know its significance. And, while they may have driven on it, they do not necessarily distinguish the Pasadena-to-downtown portion of the Parkway from the 110 Freeway further south.
- Byway visitors like to have all kinds of experiences, even in a single day. One visitor to the Gamble House continued her day with a visit to an old In-and-Out Burger stand in Pasadena (which she considered a local historical destination) and ended her day with a shopping stop at Tiffany. Another visitor expressed her enthusiasm for visiting places like Union Station, Chinatown, and Old Pasadena – and finding a “hole-in-the-wall” Mexican restaurant along the way. In a certain sense, these kinds of visitors defy our attempts to categorize them: their common thread is their diversity of interests.
- Many visitors are technologically and media-savvy. They research places on websites before they go, and many use smartphones and smartphone apps to discover places nearby. Most are not intimidated by technology and use it as a tool to discover new things.
- Many could be described as “cultural locavores.” They use social media (such as Facebook, Yelp, TripAdvisor, and others) to seek out places they want to visit. They are influenced by peer groups in learning about what’s new and interesting. And, in addition to reading mainstream media (such as the LA Times and travel guidebooks or websites), they also look

to niche websites (such as LAist.com, ExperienceLA.com, and others) to spot the latest happenings and trends.

- When asked about visiting other Byway locations, interviewees commented on how difficult it was to find information about the sites because there is no centralized source of information for the area.

All of these specific preferences and behaviors aligned with the more general preferences and behaviors exhibited by the Aspiring Contemporaries segment and the several related or “piggyback” consumer segments who follow their lead.

# Strategies and Conclusions

All of our research boils down to two principal findings which serve as a foundation for our conclusions and strategies:

1. Most visitors live nearby – and there are a lot of potential new visitors who also live nearby.
2. Most visitors like less-discovered, “off-the-beaten-path” experiences.

The first finding – that most current ASNSB visitors live nearby – narrows and focuses the target market. While some individual sites in the Byway area have national audiences, for the full set of sites in aggregate, visitors from afar are a minority, at fewer than 25%. (Those who come from other parts of the country are likely already familiar with Los Angeles and are interested in exploring its less-well-known parts.)

“Nearby” is defined broadly as Greater Los Angeles: an area that extends north to Palmdale, south to Irvine, and east to San Bernadino. But the greatest concentration of visitors across Byway sites lives within five to ten miles of any of the Byway’s attractions. This finding focuses the geographic and strategic targets of future marketing of the Byway, whether via direct mail, advertising, and even social media groups. (Note that regardless of where they live – near or far – most visitors don’t associate the sites with the Arroyo Seco Parkway or the Byway corridor.)

The second key finding of our research – that Byway visitors like “off-the-beaten-path” places and experiences – reframes how those who operate or market Byway attractions might view their mission from their audience’s perspective. In essence, even though some of the Byway sites are well-known to those partners involved in the ASNSB initiative, the sites are viewed by visitors as undiscovered places – the kinds of places that a “typical” visitor (or even a typical Angeleno) would not know about. This audience *likes* knowing about places that others might not know or visit.

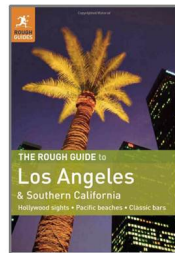
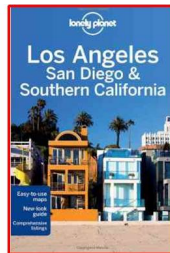
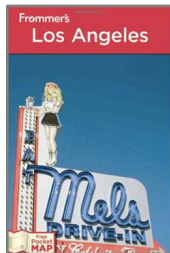
For marketing purposes, the second finding should be thought of as applying to Byway attractions *as a set*, rather than as individual sites. While some individual places are more

familiar than others, the sites as a group offer an “off-the-beaten-path” experience. And that’s part of their appeal.

### **Focus on customers**

In any endeavor to attract more people to a place – whether a cultural site, a recreational amenity, or a business – it’s important to focus on *who* they are, and then apply that knowledge to the place one is trying to market or sell. Focusing on *customers* is different from focusing on *sites*: In focusing on customers, the goal is to sell them experiences they want to have, which is different from selling them experiences we want them to have. By understanding what the visitor wants, the ASNSB steering committee can develop itineraries and experiences that a target audience will have a natural affinity to enjoy.

In order to focus on customers and effectively market the Byway to them, we have to sort them into “buckets”, or types of people who share similar traits. We used the Mosaic system (commonly used in retail and consumer products marketing) as a sorting tool.



### **The Lonely Planet**

We began our research with a hypothesis, and we concluded our research by disproving it. We hypothesized that, with the extreme diversity of sites within the Byway corridor, we could classify visitors as one of three types:

- People who like established sites and professionally-guided experiences;
- People who like experiences that are less-well-known and, by the sites’ nature, lend themselves to self-guided exploration and discovery; and
- People who like edgy experiences – places your grandmother (or mother) would never go.

Our hypothesis used shorthand labels for these three types of people: “Frommer’s”, “Lonely Planet”, or “Rough Guide” types of visitors – named for the guide books that address different types of travelers.

Such different types of visitors do exist, and the different guide books are reflections of the diversity of the visitor market. However, it turns out that the people who come to any of the

Byway sites we studied tend to share more commonalities than differences in their styles and interests. By virtue of the fact that they are exploring the Arroyo, they all tend to be interested in “off-the-beaten-path” kinds of places – and even “edgy” places. For example, those of us closely involved in preservation may view the Gamble House as well-known and established. But to most of its visitors, the Gamble House is more like a hidden treasure not visited by most people. Our findings showed that Arroyo visitors are interested in diverse experiences that span architecture, culture, food, and, to perhaps a less consistent extent, the outdoors.<sup>9</sup>

### **A market strategy**

The Byway and its diverse individual sites appeal to all kinds of people, spanning age, race, income, and even Mosaic lifestyle segment. And each of the Byway’s attractions exists in its own cultural and market context, from upscale, retail-oriented places like Old Pasadena to middle-class bungalow neighborhoods like Highland Park, to ethnic market hubs like Chinatown. This research spanned all of them. A market strategy for the Byway must work across the diverse inventory – even though such a strategy would not necessarily be appropriate to each of the Byway’s attractions as a single, stand-alone site.

A “market strategy” is a statement of intention, grounded in research on customers (visitors, in this case) and product (the Byway’s attractions, in this case). While a market strategy has an economic underpinning, it should also fit the desires and aspirations of the ASNSB’s partners and their sites. It should lie at the intersection of the market research and the wishes of the partner participants.

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<sup>9</sup> There are a few destinations in the Byway region which are very well-known and very established, including The Huntington. Because, for the present time, The Huntington is not officially participating in the ASNSB work, we did not survey or interview visitors there. It is possible that The Huntington’s visitors might be different from the visitors we studied at other sites – for example, they may be more like a “Frommer’s” traveler and may have less diverse tastes or less tolerance for urban or edgy experiences. This is a question to be explored in the future.

For the Arroyo Seco National Scenic Byway experience, we propose a market strategy as follows:

**Market the Arroyo Seco Byway experience to visitors in Greater Los Angeles whose preferences align with the *Aspiring Contemporaries* Mosaic segment and, in doing so, also draw in their “piggyback” Mosaic segments.**

Applying a specific market strategy requires making a choice to market to one group and not *all* groups. This is a hard decision to make, especially in an area as diverse as the Byway corridor. Applying this market strategy means:

- The strategy is inclusive *and* specific. Everyone is welcome to visit any of the Byway’s attractions and no one is excluded. Seniors, “Hipsters”, families, and others – regardless of their income or other demographic characteristics – all continue to represent audiences for the Byway sites. But *Aspiring Contemporaries* (along with other market segments who aspire to be like them and follow their lead) represent a group that should be *deliberately* courted because their preferences and interests, as a group, align closely with the Byway experience as a whole.
- Partner sites do not need to change their focus. Some individual sites may already have a target audience and strategy which they are pursuing. The Byway market strategy can coexist with the sites’ individual strategies. The Byway strategy can be described as an “overlay strategy” for marketing the Byway experience.
- Focus on attracting people and connecting sites. Marketing the Byway to *Aspiring Contemporaries* involves looking for geographic pockets where this audience lives, and then attracting them and exposing them to multiple sites. Many Byway sites can be packaged together to facilitate visitors’ exploration of different types of places.

The best way to apply this market strategy is for leaders from Byway partner sites to use this as an opportunity to take a “helicopter view”: to take a step back from site-focused marketing initiatives and think about how their site could be part of a Byway experience – and how that experience appeals to a specific kind of visitor.

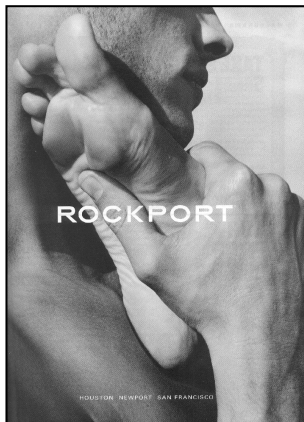


Figure 7: Three examples of aspirational ads.

## What does this kind of marketing look like?

Marketing the Byway experience to Aspiring Contemporaries resembles, in some ways, how consumer products and services are marketed to similar segments: rather than touting the benefits or superiority of the product, they sell an image that the viewer aspires to or identifies with. A few examples of mainstream advertising reflecting this characteristic are illustrated at left.

Attracting the Aspiring Contemporaries audience involves conveying an “insider” quality that invites the prospective visitor to discover something that others have not found. It means striking a balance between pointing people to attractions, and allowing them to discover the attractions on their own. For example, this audience would respond positively if they were indirectly introduced to, or stumbled upon, Galco’s Soda Pop Stop. They would respond negatively to a big sign that said, “world-famous soda supermarket this way!”. Too much publicity (or too hard a sell) is inconsistent with the “off-the-beaten-path” experience that appeals to this audience.

Because the most accessible set of Byway visitors live nearby – within 10 miles of the Byway’s center, there are 10 zip codes with a high density of Aspiring Contemporary households – attracting this market segment is very much within reach. Channel partners and other venues (real or virtual) that already attract this segment provide logical starting points. Such channel partners include:

- Social media. Connecting to existing online groups that already place an emphasis on off-the-beaten-path Los Angeles experiences, including culture, food, and the outdoors;
- Partners’ contact lists. Using ASNSB-partner email or ConstantContact lists to send news about cool happenings in the Byway;
- Local-tourism partners. Developing itineraries for known channel partners (e.g., LA Commons and the LA Conservancy);
- Mainstream and alternative media. Feeding information about the hidden treasures of the Arroyo to Los Angeles writers and bloggers on culture, food, and the outdoors;

A concurrent effort, led by other members of the ASNSB team, is developing a marketing and branding plan for the Byway which will target the audiences identified in this research.

## Examples of programs that appeal to Byway visitors

When marketing an extremely diverse product, the best examples of replicable programs and activities are those that cut across multiple places, or types of places, and weave them together into experiences that appeal to the same type of visitor. A number of examples follow. Some of these examples could be adapted to connect various Byway attractions. All of them have an approach or attitude that could fit the Byway's target visitor audience.

Food is often used as a connector, and existing organizations in Los Angeles (e.g., Melting Pot Tours) are already conducting cultural food tours.

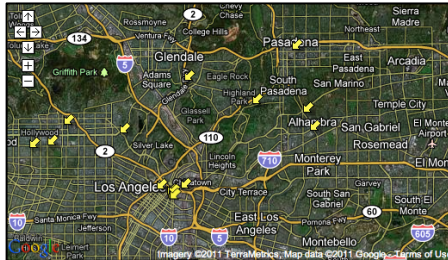


Figure 8: Food truck (Washington, DC), top; YellowArrow (Los Angeles), middle; and Murmur Project (Toronto), bottom.

- In a branding example from Allston Village, an international neighborhood of Boston, Mass., the diversity of offerings was used as a connecting theme. It seems like an obvious solution now, but the puzzle of connecting multiple ethnicities, languages, and food and retail businesses was not so obvious at the outset. Allston's branding campaign included a series of word plays:
    - "Think globally, eat locally. It's all in Allston."
    - "Fish or Phish. It's all in Allston."
    - "Pho or Faux. It's all in Allston."
  - Food trucks have become a foodie phenomenon in cities across the country, including Los Angeles. In the Byway area, some of the cultural sites are not immediately adjacent to restaurant and dining amenities. There may be opportunities to connect visitors to local restaurants using a food truck concept that comes to the cultural sites.
- Storytelling has been used as a way to connect people to places in several successful initiatives:
- "Yellow Arrow" ([www.yellowarrow.net](http://www.yellowarrow.net)) is a global public art project where people place yellow arrow stickers on things or places, and then connect that physical arrow to a virtual arrow placed on an online map, and they write a few lines about the significance of the place.
  - "Murmur" is a documentary oral history project that began in Toronto in 2003 ([www.murmurtoronto.ca](http://www.murmurtoronto.ca)) and has expanded to other cities. Visitors record a story about a



Figure 9: UrbanQuest website, top; Fairy Door (Ann Arbor, MI), bottom.

place and connect the recording to an online map. The stories can be heard via cell phone or on the website.

- Denver Story Trek ([www.denverstorytrek.org](http://www.denverstorytrek.org)), like Murmur, presents oral histories of the city. Its stories are downloadable and curated by district and theme. Some of the stories are recorded by famous personalities.
- UrbanQuest ([www.urbanquest.com](http://www.urbanquest.com)) creates urban scavenger hunts, with questions to answer and puzzles to solve along the way. A visitor can download an UrbanQuest for a particular area and, with a friend, race to solve the mystery. The UrbanQuests are designed to connect participants to local businesses – they all end at a mystery restaurant related to the puzzle.
- Fairy Doors is a public art project ([www.urban-fairies.com](http://www.urban-fairies.com)) in Ann Arbor, Michigan, where artists have installed miniature doorways – some elaborately designed – in hidden places throughout downtown, both inside and outside buildings. As a collection, they create a kind of self-discovery reason to explore downtown. A physical device like this – especially one that uses the indigenous arts and artists of the Arroyo (e.g., stained glass or other local crafts) – could be used to connect the Byway’s diverse resources. And the almost-hidden, insider nature of the Fairy Doors project also suits the Byway’s target audience.

### Tracking impacts

The consortium of Byway sites can work together to bring some standardization to the ways in which visitor trends and awareness are tracked. Individual sites are likely most interested in (and some already track) the number of visitors, where visitors live, and how they heard about the place. These kinds of visitor profile information-gathering could be incorporated into a short survey, administered regularly, with several standardized questions across all participating Byway sites. Surveys should track:

- Awareness of the Arroyo Seco Parkway and/or the National Scenic Byway;
- Awareness of other sites in the Byway corridor;
- Extent to which visitors at the surveyed site also visited other sites
- Extent to which visitors used nearby commercial amenities (esp. restaurants)

The data from surveys conducted for this research project can serve as a baseline for the six Byway sites (excluding CAFAM and the Gold Line) where surveys were distributed. Future surveys can compare trade areas, visitor profiles, and awareness to these data sets.

Any *new* projects and programs created by the consortium of Byway attractions (esp. projects designed to encourage visitation across multiple sites) should incorporate a measurable outcome. For example,

- For an *event*, track upticks in visitation at participating sites (compared to typical attendance for a day in the same season) and visitor spending (at the site and at nearby businesses);
- For a *discount program* (e.g., discount on admission charges or at local restaurants), track redemptions of coupons;
- For social media, track engagement, check-ins, and followers through any of various analytics tools (e.g., sproutsocial.com, chartbeat.com, lithium.com, and others).

In addition to quantifying increases in visitation at specific sites and across multiple sites, the consortium should also track tangible projects the Byway partners create together – e.g., Byway maps, collectible patches or stickers, brochures, events, media placements, and other outcomes resulting from this new collaboration.

### **F i n a l   t h o u g h t s**

When we think of ourselves as consumers or visitors, our tendency is to think, “everyone must like the things I like”. It only makes sense to think of our behaviors and preferences as “typical” and that other people have similar tastes. Similarly, when we think about marketing, our temptation is to try to attract *everyone* because, we often assume, everyone will have some interest in a particular site or subject.

We know, however, that people are different: They buy different kinds of things and enjoy different experiences. This has been the core inquiry in our research for the Byway: What defines the person who would want to visit these unique places – and, particularly, *clusters* of places, and where do these people live?

The best outcome of this research, and of the goal to tell the story of the Arroyo Seco Parkway, will be if the Byway's sites and partners can come together, under an umbrella entity, for the purpose of telling a larger story and connecting multiple and diverse sites. Focusing on a discreet audience and a strategy creates a framework for that goal to be realized.

Some of the projects to advance this goal – and attract the target audience – are capital-intensive (such as sign systems and technology development). But many are low-cost (or no-cost) and grassroots in nature, especially those involving social media, email marketing, and guerilla-style art projects at which many Byway partners excel. Using the strategy presented in this report, and connecting it to the related branding and interpretive-theme components of the Byway plan, the site partners can build a larger audience for the whole set of Byway attractions. And for much of that potential audience – for whom the Byway is undiscovered territory – these cultural, natural, and commercial attractions exist very near to where they live, and even in their own backyard.

# About the team



## **Joshua Bloom and CLUE Group**

The Community Land Use and Economics Group, LLC (CLUE Group) is a small, specialized consulting firm that helps community leaders create vibrant downtowns. We work with local and state governments and nonprofit downtown revitalization organizations to develop practical and innovative economic development strategies, cultivate independent businesses, identify regulatory and financial barriers to revitalization, and strengthen downtown management programs.

CLUE Group provides a broad range of economic development, retail market analysis and business development planning services, including:

- Retail mix analysis
- Retail sales gap analysis
- Business mix strategies
- Heritage tourism development
- Business profile development
- Economic benchmarking
- District business development planning
- District marketing and promotion strategies
- Economic and fiscal impact analysis
- Economic restructuring implementation strategies

Josh teaches communities how to revitalize their commercial centers by first gaining an understanding of their local economies and then helping them apply that knowledge to a series of market-driven and achievable projects. He has particular interests in using research on local customers to deepen the picture painted by traditional demographic data sources, and in cultivating sustainable clusters of chain and independent businesses. He has published articles on both of these subjects.

Before joining the CLUE Group, Josh spent ten years as a program officer at the National Trust for Historic Preservation's National Main Street Center. While he works in communities of all sizes, he was instrumental at the Main Street Center in expanding the program's urban reach to cities that included Boston, Cleveland, St. Louis, Los Angeles and others.



#### **Surale Phillips and Decision Support Partners**

Surale started DSP, Inc. in 2002 after 13 years of working in arts research and consulting for a national firm to provide a fresh, collegial consulting practice to the cultural field — to bring the best people and skills together to do good business for the arts business.

As a research specialist, her work has supported collaborative audience development projects, market studies, feasibility studies, community cultural needs assessments and plans, program evaluation, strategic plans, and national field studies for 19 years. Surale works both independently on projects and with select consultants with expertise in arts center business plans, arts education, nonprofit management, and community development. Surale has served as Executive Director and Board Member of Classics for Kids Foundation. She is a frequent presenter on the national circuit including Americans for the Arts, National Arts Marketing Project, Midwest Council on Philanthropy, Kentucky Arts Presenters, and American Folklorist Society.

Surale enjoys a strong reputation as both a researcher and interpretive advocate for her clients. She believes it is equally important to ask the right questions as it is for clients to easily adapt research findings into their present and future operations. Her research has been the foundation for projects for the National Endowment for the Arts, arts service organizations, state and local arts agencies, performing arts presenters, museums, foundations, and other nonprofit businesses.

# Disclaimer

Market research and analysis provide important guidance on how the Arroyo Seco's cultural and commercial sites can, theoretically, perform and on the visitor types and market size the region should be able to attract. However, a number of factors affect actual performance of the Arroyo Seco's associated sites, including skills of the operators, level of capitalization, quality of the physical environment, changes in overall economic conditions, marketing programs, and numerous other factors. The information and recommendations in this market study are intended to provide a foundation of information for making heritage tourism development decisions for the Arroyo Seco National Scenic Byway, but they do not and cannot ensure future success.

This report's findings, conclusions, and recommendations are solely those of the consultants and should not be assumed to represent the opinions of the Arroyo Guild, the Mountains Recreation and Conservation Authority, ASNSB partner sites, or any other party.

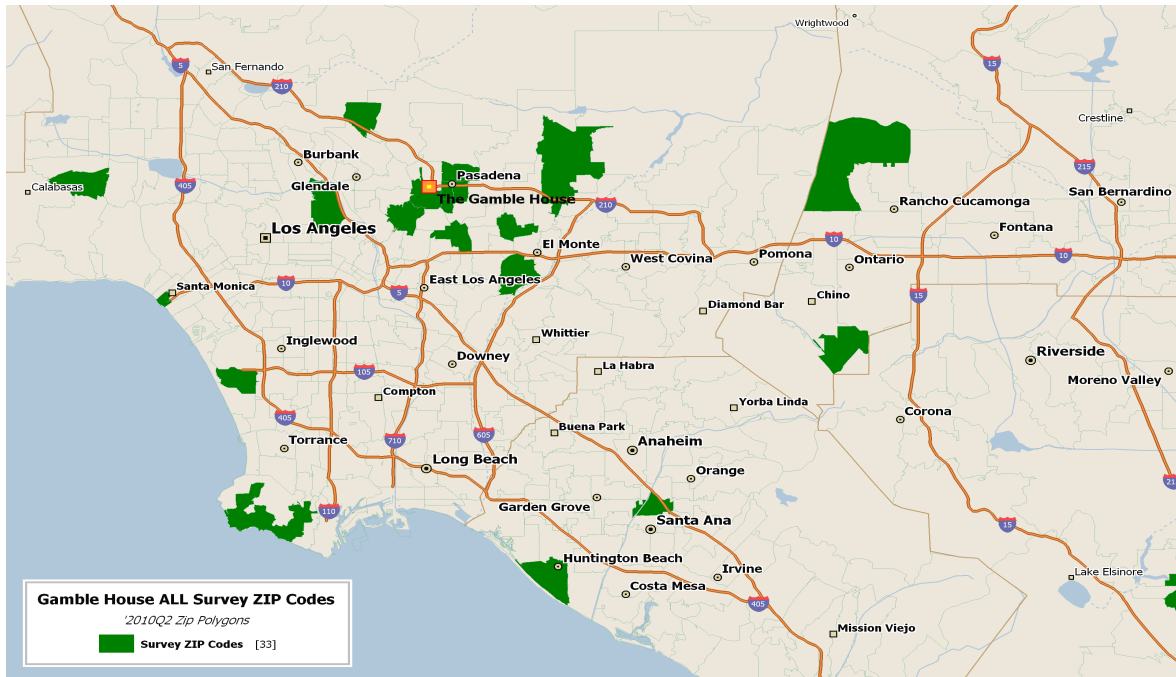
# Appendices

- Trade areas, by survey site
- Travel preferences: All respondents, and by survey site
- Greater Los Angeles Zip codes in which Aspiring Contemporaries predominate

## Trade areas, by survey site

### Gamble House

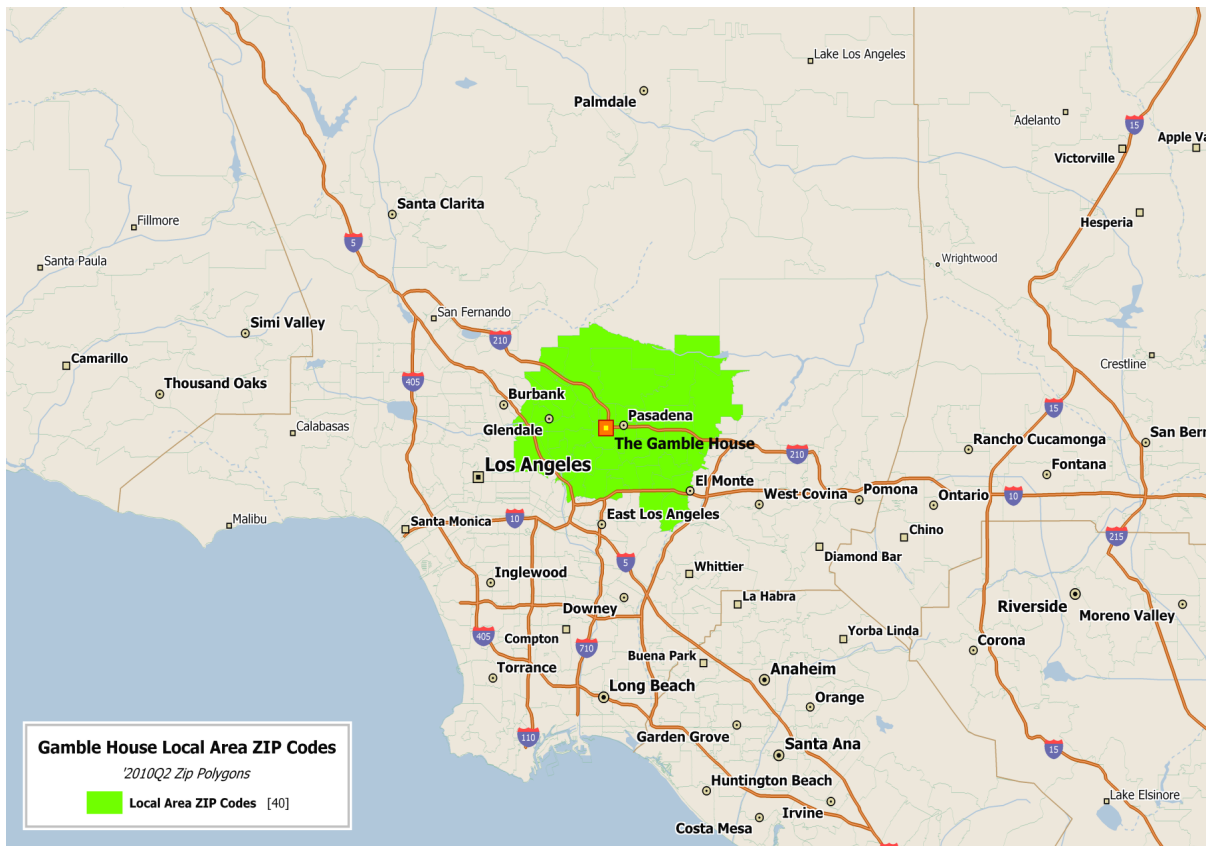
The following map represents Greater Los Angeles zip code areas where Gamble House visitors live. (51% of all Gamble House visitors live in Greater Los Angeles.)



The following table lists all Mosaic segments (and their relative presence), along with the number of households (by Mosaic segment) in the zip codes illustrated above.

Gamble House Visitors Based on All Survey ZIP Codes	Household Counts	Percentage of Households
<b>Affluent Suburbia</b>	<b>91,657</b>	<b>24%</b>
<b>Upscale America</b>	<b>103,565</b>	<b>27%</b>
Small Town Contentment	22,437	6%
Blue Collar Backbone	25,531	7%
American Diversity	25,142	6%
Metro Fringe	25,184	6%
Remote America	1,288	0%
<b>Aspiring Contemporaries</b>	<b>66,529</b>	<b>17%</b>
Rural Villages & Farms	3,066	1%
Struggling Societies	19,663	5%
Urban Essence	4,521	1%
Varying Lifestyles	1,185	0%
Total Households in Survey ZIP Codes	389,768	100%

The following map represents our best estimate of the *local* zip code cluster that makes up the catchment area for Gamble House visitors.



In the local zip code cluster, the following Mosaic segments are dominant. Also shown are the respective number of households for each Mosaic segment.

Household Count in Local ZIP Codes (40 ZIP Codes; ~10 mi.)	Household counts	Percentage of Households
Affluent Suburbia	62,964	15%
Upscale America	68,554	17%
Aspiring Contemporaries	90,589	22%
Total Top MOSAIC Groups in Local ZIP Codes	222,107	55%
Total Households in Local ZIP Codes	406,550	

The following map represents our best estimate of secondary (i.e., regional) zip code cluster for Gamble House visitors.

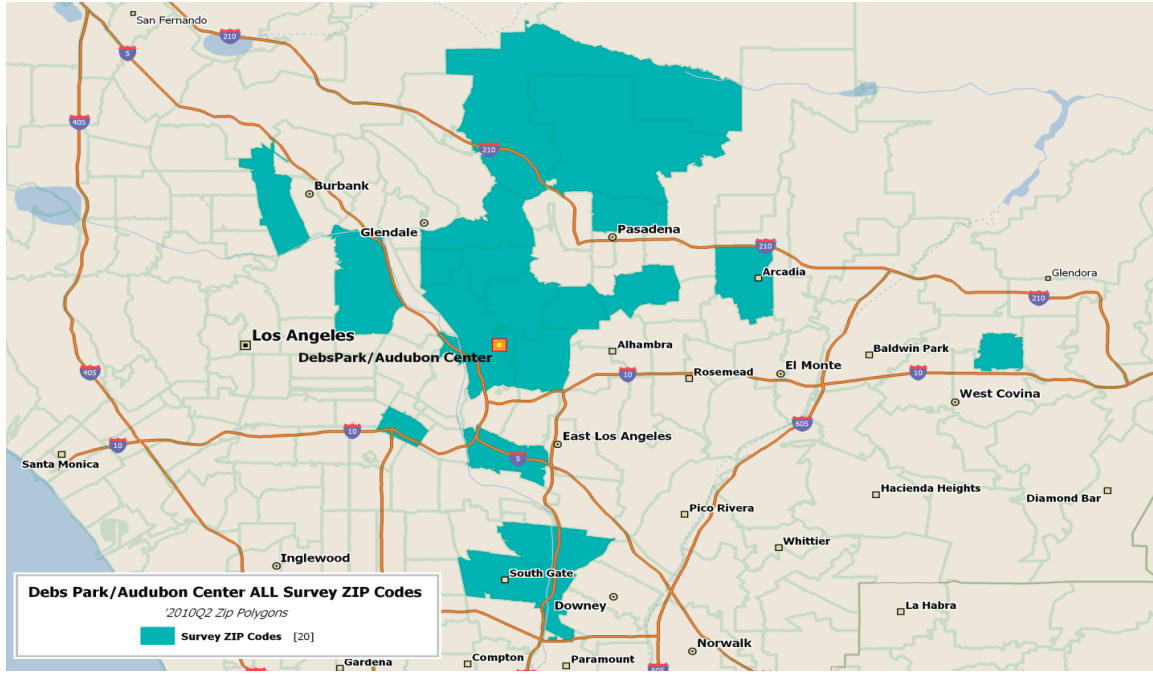


In the cluster of *regional* zip codes, the following Mosaic segments are dominant. Also listed are the respective number of households for each Mosaic segment.

Household Count in Secondary ZIP Codes (301 ZIP Codes; ~ 30 mi.)	Household counts	Percentage of Households
Affluent Suburbia	457,365	14%
Upscale America	701,910	21%
Aspiring Contemporaries	693,342	21%
Total Top MOSAIC Groups in Secondary ZIP Codes	1,852,617	55%
Total Households in Secondary Zip Codes	3,358,522	

## Debs Park / Audubon Center

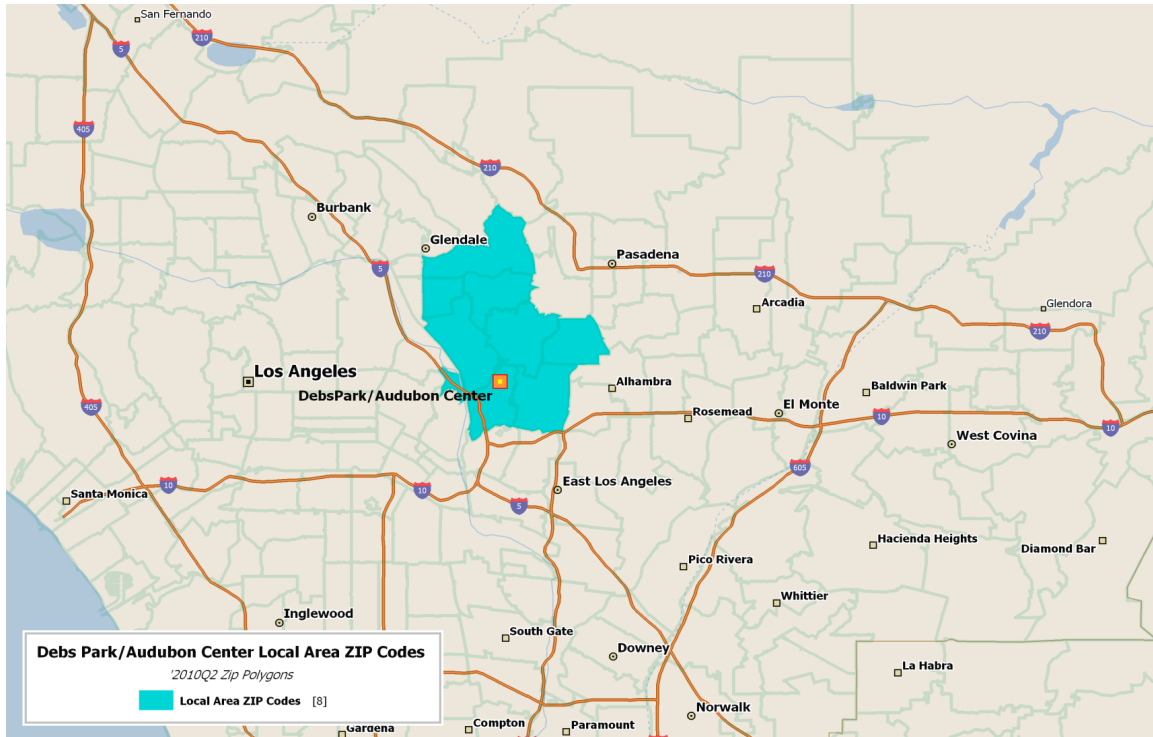
The following map represents Greater Los Angeles zip code areas where Debs Park visitors live. (100% of all Debs Park visitors live in Greater Los Angeles.)



The following table lists all Mosaic segments (and their relative presence), along with the number of households (by Mosaic segment) in the zip codes illustrated above.

Debs Park/Audubon Center Visitors Based on All Survey ZIP Codes	Household Counts	Percentage of Households
Affluent Suburbia	27,316	7%
Upscale America	26,727	7%
Small Town Contentment	14,631	4%
<b>Blue Collar Backbone</b>	<b>43,985</b>	<b>11%</b>
American Diversity	18,606	5%
Metro Fringe	5,313	1%
Remote America	-	0%
<b>Aspiring Contemporaries</b>	<b>44,830</b>	<b>12%</b>
Rural Villages & Farms	59	0%
<b>Struggling Societies</b>	<b>74,169</b>	<b>19%</b>
Urban Essence	1,588	0%
Varying Lifestyles	51	0%
Total Households in Survey ZIP Codes	257,275	66%

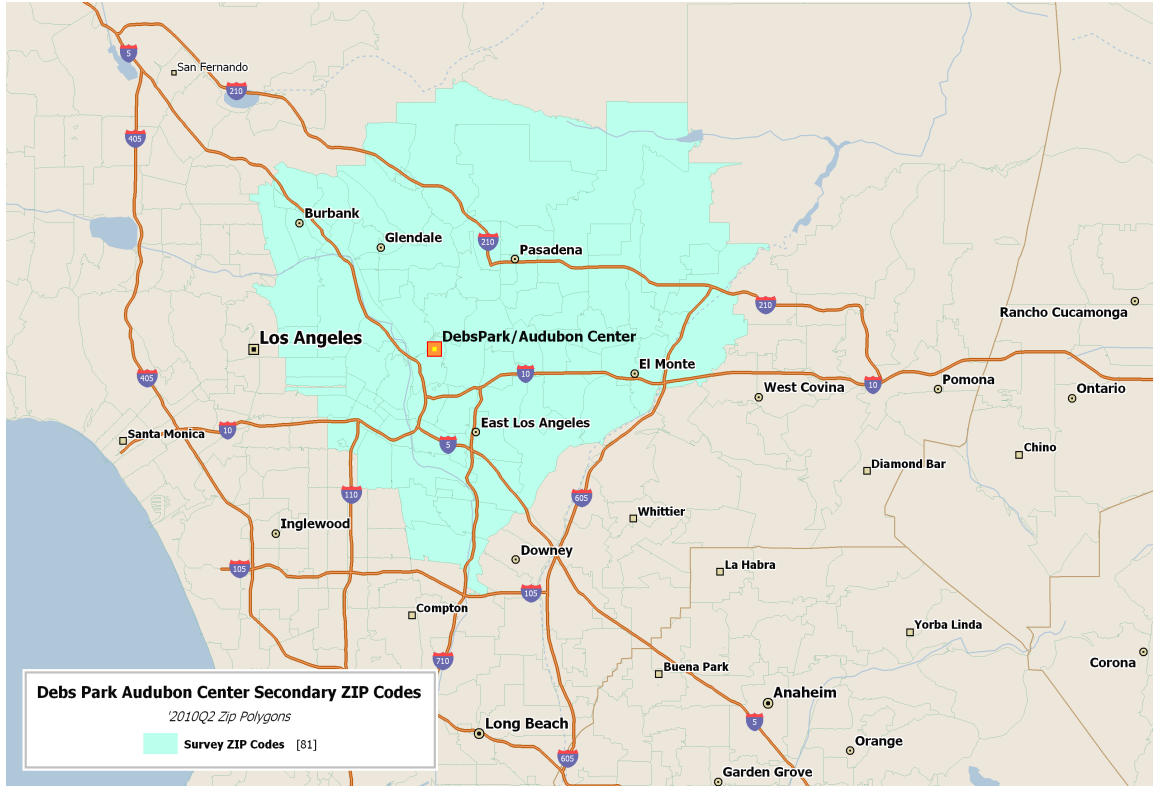
The following map represents our best estimate of the *local* zip code cluster that makes up the catchment area for Debs Park visitors.



In the local zip code cluster, the following Mosaic segments are dominant. Also shown is the respective number of households for each Mosaic segment.

Household Count in Secondary ZIP Codes (81 ZIP Codes; ~15 mi.)	Household counts	Percentage of Households
Blue Collar Backbone	138,617	16%
Aspiring Contemporaries	162,884	18%
Struggling Societies	263,057	30%
Total Top MOSAIC Groups in Secondary ZIP Codes	564,558	64%
Total Households in Secondary ZIP Codes	887,012	

The following map represents our best estimate of secondary (i.e., regional) zip code cluster for Debs Park visitors.

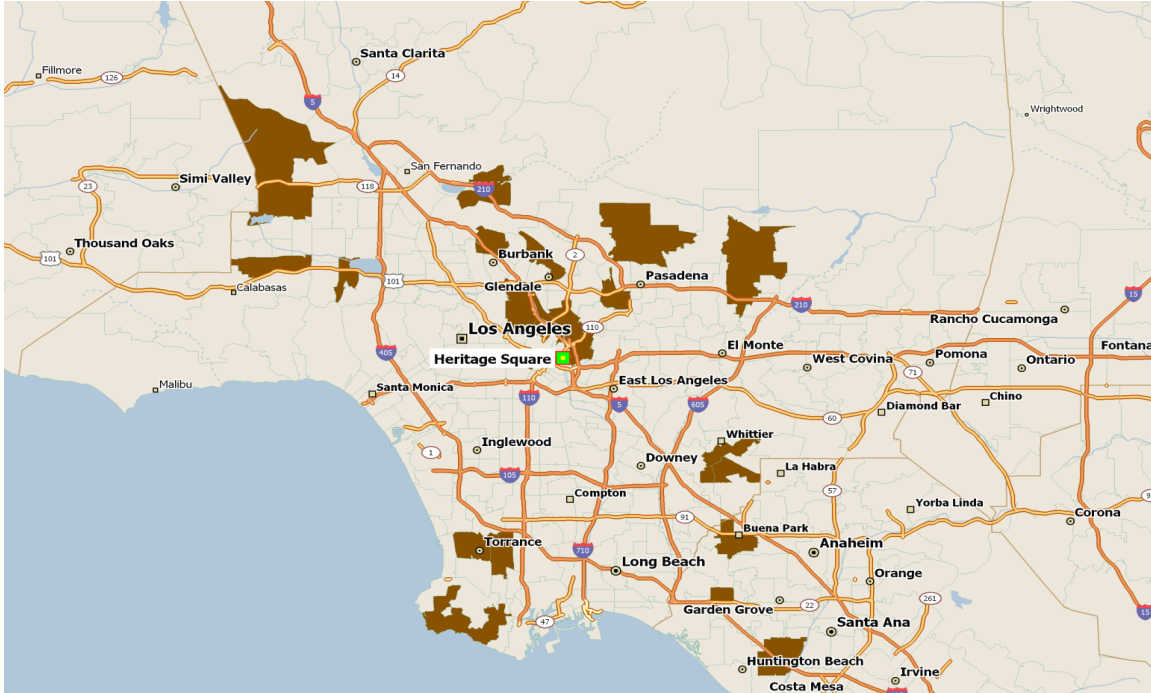


In the cluster of *regional* zip codes, the following Mosaic segments are dominant. Also listed are the respective number of households for each Mosaic segment.

Household Count in Secondary ZIP Codes (81 ZIP Codes; ~15 mi.)	Household counts	Percentage of Households
Blue Collar Backbone	138,617	16%
Aspiring Contemporaries	162,884	18%
Struggling Societies	263,057	30%
Total Top MOSAIC Groups in Secondary ZIP Codes	564,558	64%
Total Households in Secondary ZIP Codes	887,012	

## Heritage Square

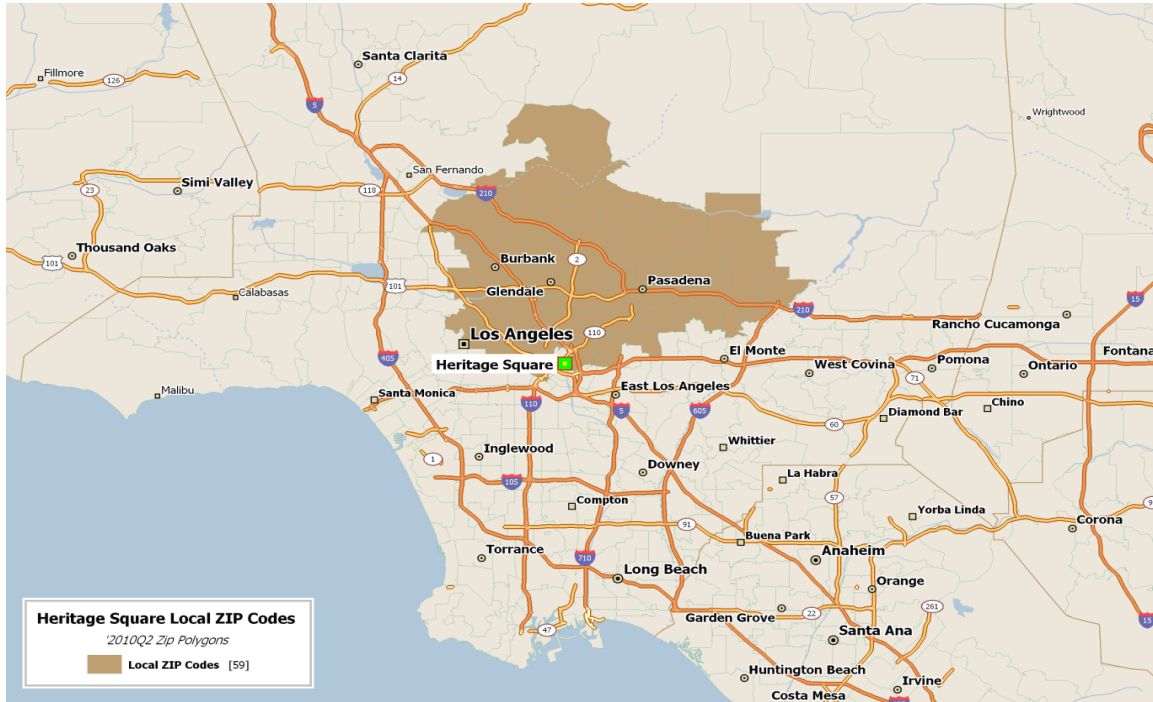
The following map represents Greater Los Angeles zip code areas where Heritage Square visitors live. (75% of all Heritage Square visitors live in Greater Los Angeles.)



The following table lists all Mosaic segments (and their relative presence), along with the number of households (by Mosaic segment) in the zip codes illustrated above.

	Household	Percentage of
Heritage Square Visitors Based on All Survey ZIP Codes	Counts	Households
Affluent Suburbia	68,640	19%
Upscale America	90,626	25%
Small Town Contentment	17,518	5%
Blue Collar Backbone	28,297	8%
American Diversity	22,531	6%
Metro Fringe	19,448	5%
Remote America	24	0%
Aspiring Contemporaries	79,000	22%
Rural Villages & Farms	303	0%
Struggling Societies	27,800	8%
Urban Essence	6,623	2%
Varying Lifestyles	23	0%
Total Households in Survey ZIP Codes	360,833	100%

The following map represents our best estimate of the *local* zip code cluster that makes up the catchment area for Heritage Square visitors.



In the local zip code cluster, the following Mosaic segments are dominant. Also shown is the respective number of households for each Mosaic segment.

Household Count in Local ZIP Codes (59 ZIP Codes; ~ 20 mi.)	Household counts	Percentage of Households
Affluent Suburbia	78,183	13%
Upscale America	81,908	13%
Aspiring Contemporaries	165,435	27%
Total Top MOSAIC Groups in Local ZIP Codes	325,526	53%
Total Households in Local ZIP Codes	613,485	

The following map represents our best estimate of secondary (i.e., regional) zip code cluster for Heritage Square visitors.

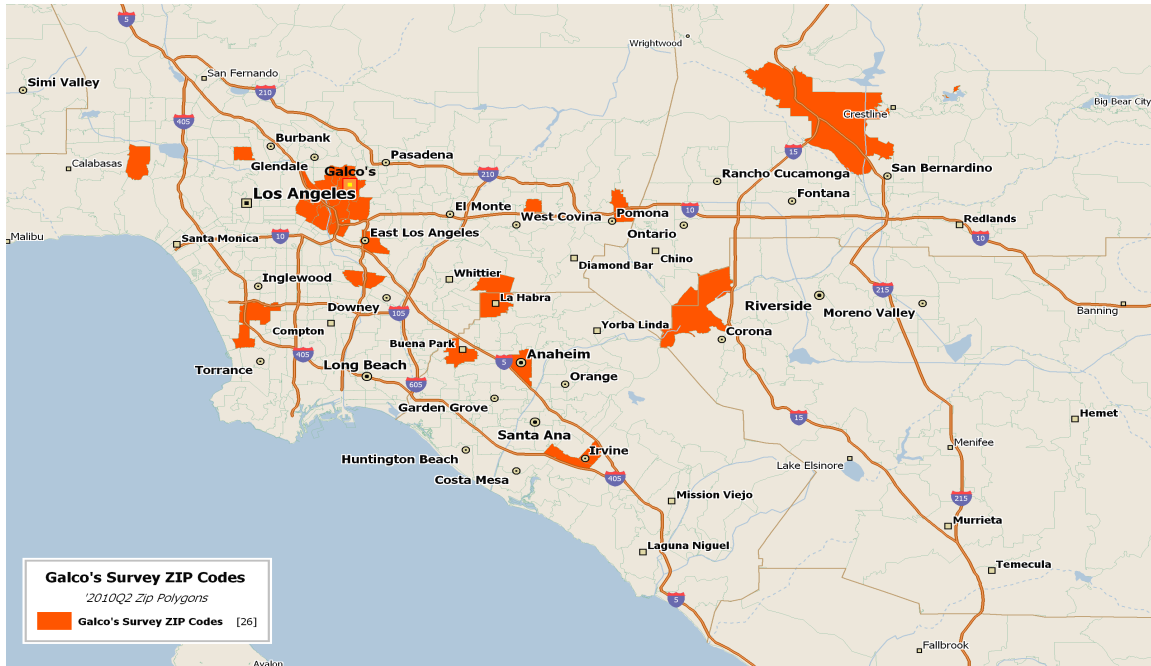


In the cluster of *regional* zip codes, the following Mosaic segments are dominant. Also listed are the respective number of households for each Mosaic segment.

Household Count in Secondary ZIP Codes (268 ZIP Codes; ~40 mi.)	Household counts	Percentage of Households
Affluent Suburbia	363,600	12%
Upscale America	583,364	20%
Aspiring Contemporaries	672,857	22%
Total Top MOSAIC Groups in Secondary ZIP Codes	1,619,821	54%
Total Households in Secondary ZIP Codes	2,990,848	

## Galco's Soda Pop Stop

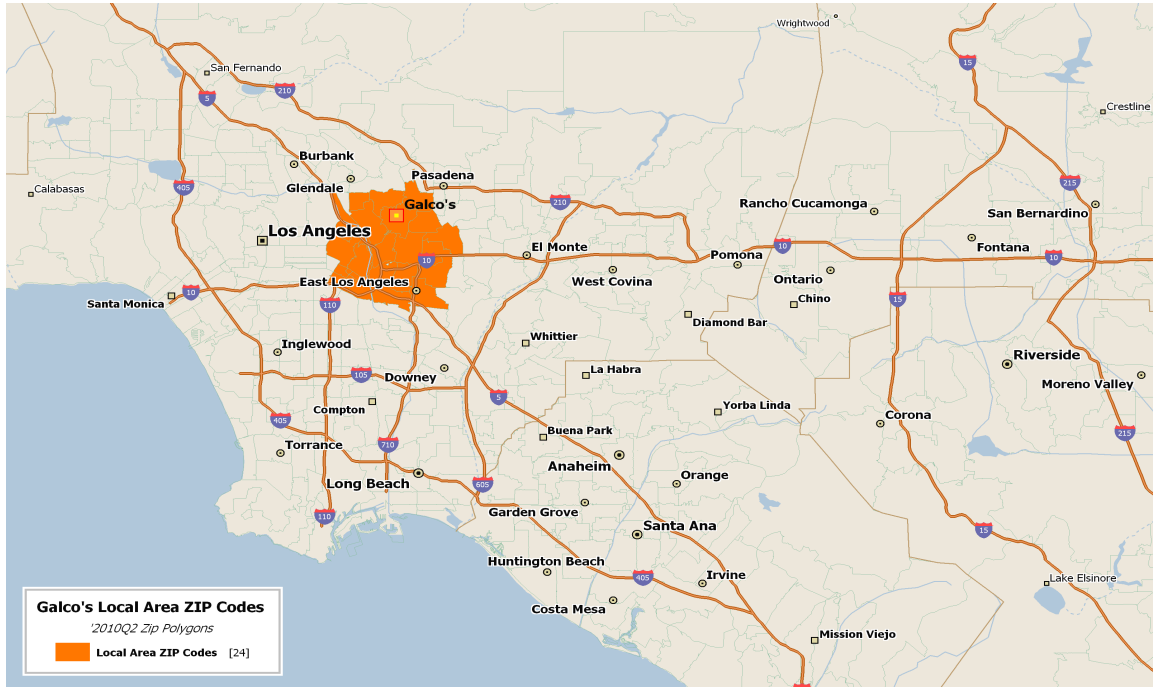
The following map represents Greater Los Angeles zip code areas where Galco's customers live. (87% of all Galco's customers live in Greater Los Angeles.)



The following table lists all Mosaic segments (and their relative presence), along with the number of households (by Mosaic segment) in the zip codes illustrated above.

Galco's Visitors Based on All Survey ZIP Codes	Household Counts	Percentage of Households
Affluent Suburbia	32,839	9%
Upscale America	62,669	17%
Small Town Contentment	12,081	3%
Blue Collar Backbone	65,687	18%
American Diversity	13,696	4%
Metro Fringe	13,189	4%
Remote America	12	0%
Aspiring Contemporaries	66,284	18%
Rural Villages & Farms	43	0%
Struggling Societies	96,502	26%
Urban Essence	11,209	3%
Varying Lifestyles	302	0%
Total Households in Survey ZIP Codes	374,513	100%

The following map represents our best estimate of the *local* zip code cluster that makes up the catchment area for Galco's customers.



In the local zip code cluster, the following Mosaic segments are dominant. Also shown is the respective number of households for each Mosaic segment.

	Household	Percentage of
Household Count in Local ZIP Codes (24 ZIP Codes; ~5 mi.)	count	Households
Struggling Societies	94,329	36%
Blue Collar Backbone	47,387	18%
Aspiring Contemporaries	39,187	15%
Upscale America	26,801	10%
Total Top MOSAIC Groups in Local ZIP Codes	207,704	69%
Total Households in Local ZIP Codes	260,528	

The following map represents our best estimate of secondary (i.e., regional) zip code cluster for Galco's customers.

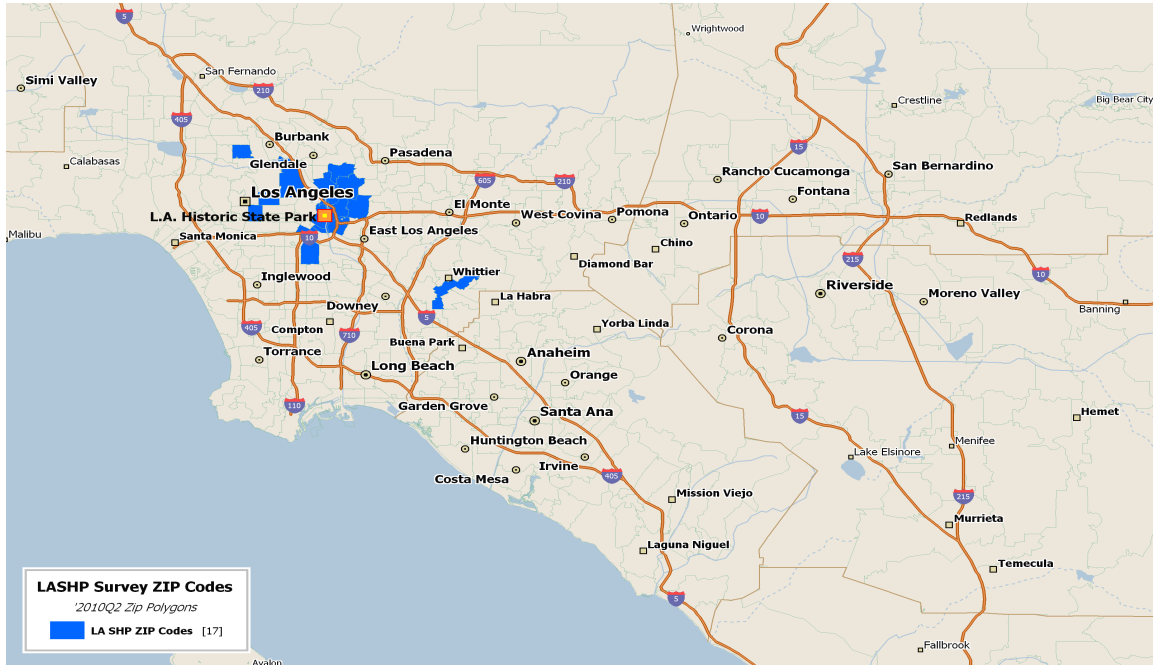


In the cluster of *regional* zip codes, the following Mosaic segments are dominant. Also listed are the respective number of households for each Mosaic segment.

Household Count in Secondary ZIP Codes (285 ZIP Codes; ~ 30 mi.)	Household count	Percentage of Households
Aspiring Contemporaries	686,528	21%
Upscale America	659,817	21%
Struggling Societies	506,338	16%
Blue Collar Backbone	428,803	13%
Total Top MOSAIC Groups in Secondary ZIP Codes	2,281,486	68%
Total Households in Secondary ZIP Codes	3,210,547	

## LA State Historic Park

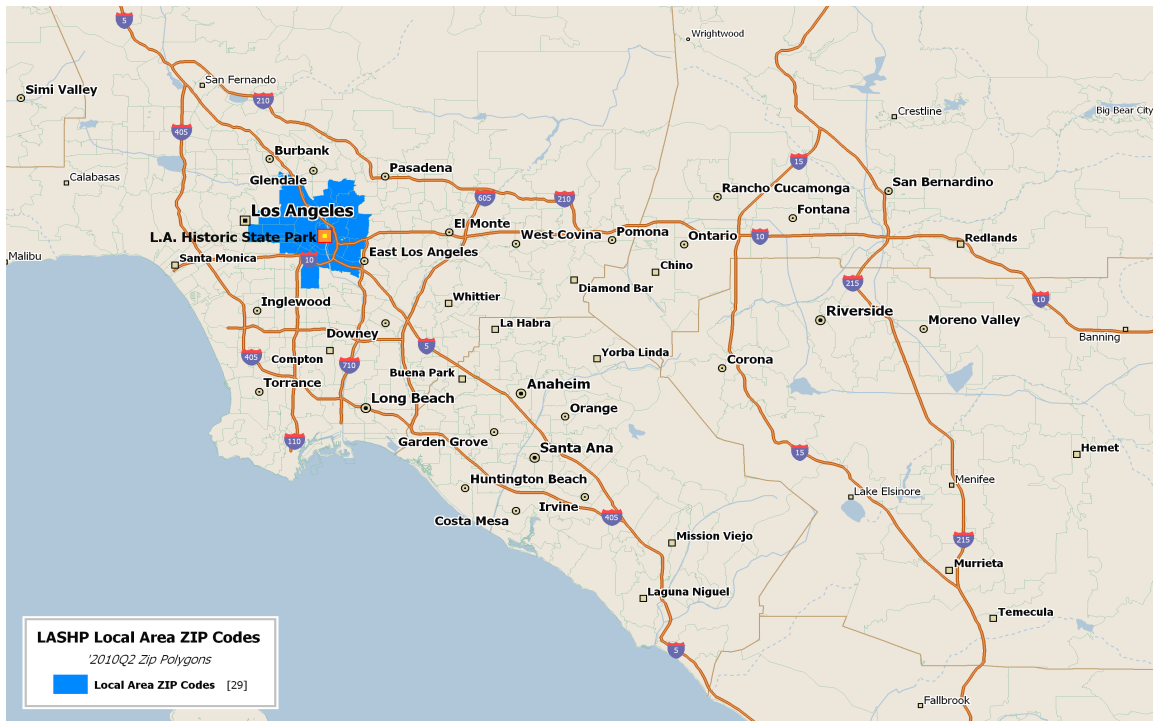
The following map represents Greater Los Angeles zip code areas where LASHP visitors live. (98% of all Heritage Square visitors live in Greater Los Angeles.)



The following table lists all Mosaic segments (and their relative presence), along with the number of households (by Mosaic segment) in the zip codes illustrated above.

L.A. State Historic Park Visitors Based on All Survey ZIP Codes	Household Counts	Percentage of Households
Affluent Suburbia	4,842	2%
Upscale America	20,049	10%
Small Town Contentment	7,306	4%
Blue Collar Backbone	28,040	14%
American Diversity	9,128	5%
Metro Fringe	5,340	3%
Remote America	-	0%
Aspiring Contemporaries	47,144	24%
Rural Villages & Farms	-	0%
Struggling Societies	68,240	35%
Urban Essence	3,886	2%
Varying Lifestyles	71	0%
Total Households in Survey ZIP Codes	194,046	100%

The following map represents our best estimate of the *local* zip code cluster that makes up the catchment area for LASHP visitors.



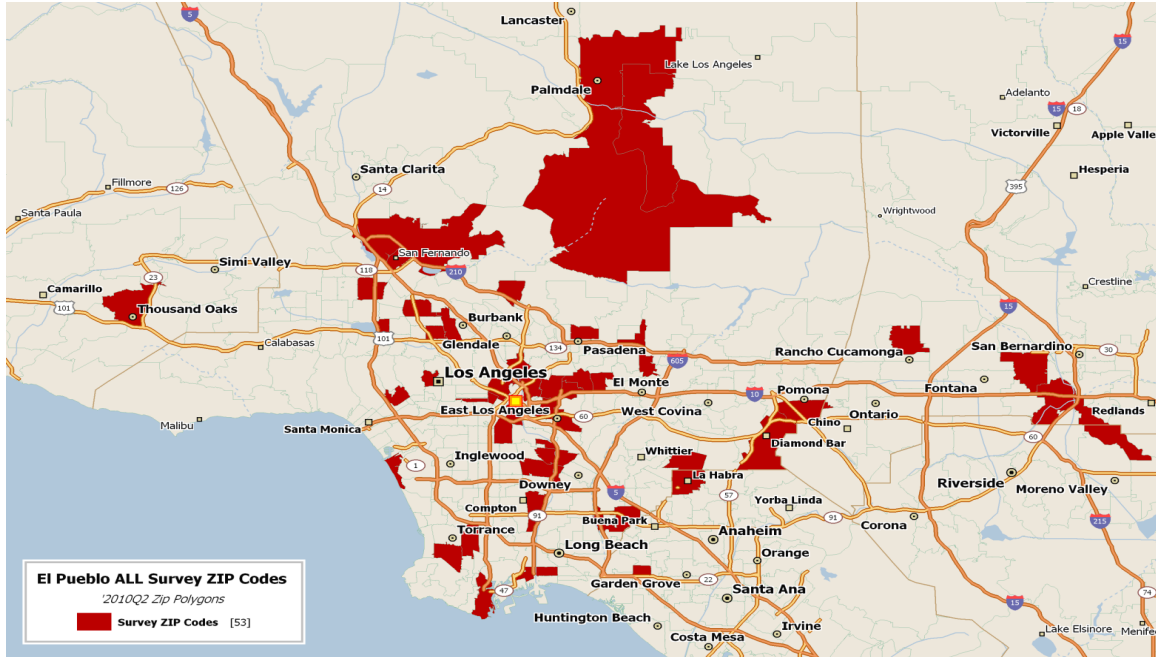
In the local zip code cluster, the following Mosaic segments are dominant. Also shown is the respective number of households for each Mosaic segment.

	Household	Percentage of
Household Count in Local ZIP Codes (29 ZIP Codes; ~5 mi.)	count	Households
Upscale America	21,587	6%
Blue Collar Backbone	48,083	13%
Aspiring Contemporaries	77,513	21%
Struggling Societies	163,599	45%
Total Top MOSAIC Groups in Immediate Area	310,782	40%
Total Households in Local ZIP Codes	366,371	

Regional visitors were not a significant factor in survey responses, therefore secondary/regional catchment areas are not shown.

## El Pueblo

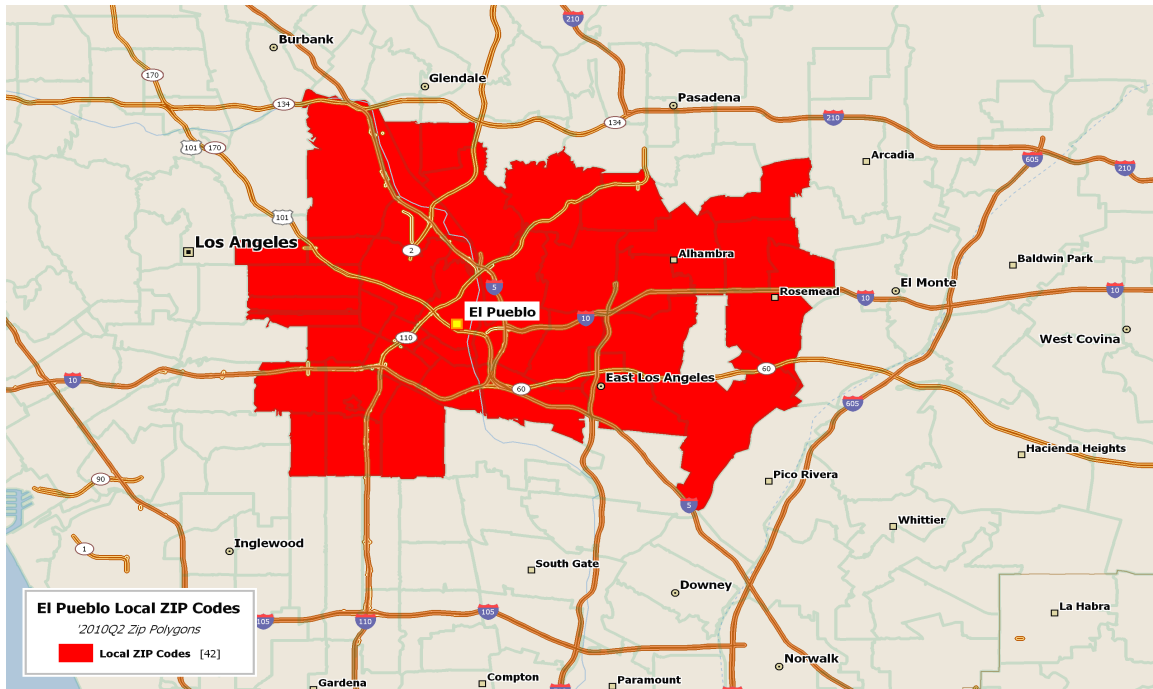
The following map represents Greater Los Angeles zip code areas where El Pueblo visitors live. (63% of all El Pueblo visitors live in Greater Los Angeles.)



The following table lists all Mosaic segments (and their relative presence), along with the number of households (by Mosaic segment) in the zip codes illustrated above.

El Pueblo Visitors Based on All Survey ZIP Codes	Household Counts	Percentage of Households
<b>Affluent Suburbia</b>	<b>70,975</b>	<b>10%</b>
<b>Upscale America</b>	<b>126,294</b>	<b>18%</b>
Small Town Contentment	26,490	4%
<b>Blue Collar Backbone</b>	<b>107,232</b>	<b>15%</b>
American Diversity	39,712	6%
Metro Fringe	25,931	4%
<b>Remote America</b>	<b>356</b>	<b>0%</b>
<b>Aspiring Contemporaries</b>	<b>91,705</b>	<b>13%</b>
Rural Villages & Farms	488	0%
Struggling Societies	180,762	26%
Urban Essence	23,139	3%
Varying Lifestyles	2,026	0%
Total Households in Survey ZIP Codes	695,110	100%

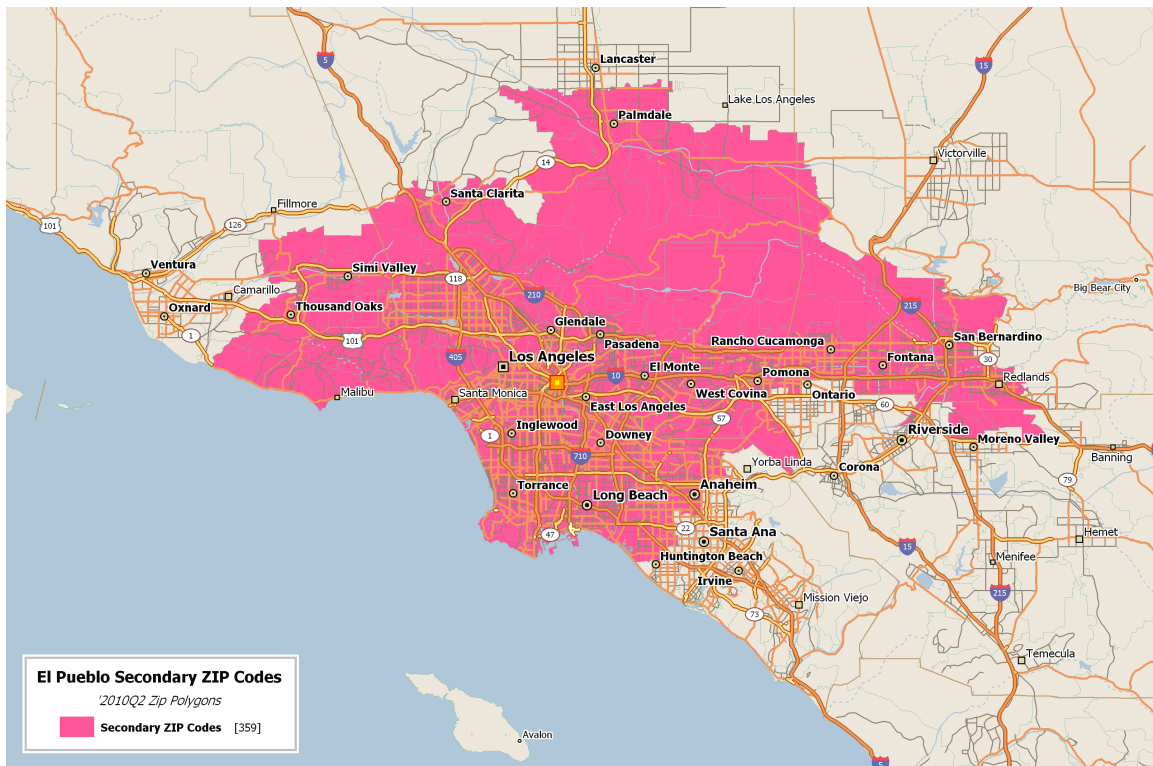
The following map represents our best estimate of the *local* zip code cluster that makes up the catchment area for El Pueblo visitors.



In the local zip code cluster, the following Mosaic segments are dominant. Also shown is the respective number of households for each Mosaic segment.

Household Count in Local ZIP Codes (42 ZIP Codes; ~ 15 mi.)	Household count	Percentage of Households
Affluent Suburbia	14,761	3%
Upscale America	42,083	8%
Blue Collar Backbone	77,440	15%
Remote America	-	0%
Aspiring Contemporaries	93,522	18%
Total Top MOSAIC Groups in Local ZIP Codes	227,806	44%
Total Households in Local ZIP Codes	518,132	

The following map represents our best estimate of secondary (i.e., regional) zip code cluster for El Pueblo visitors.

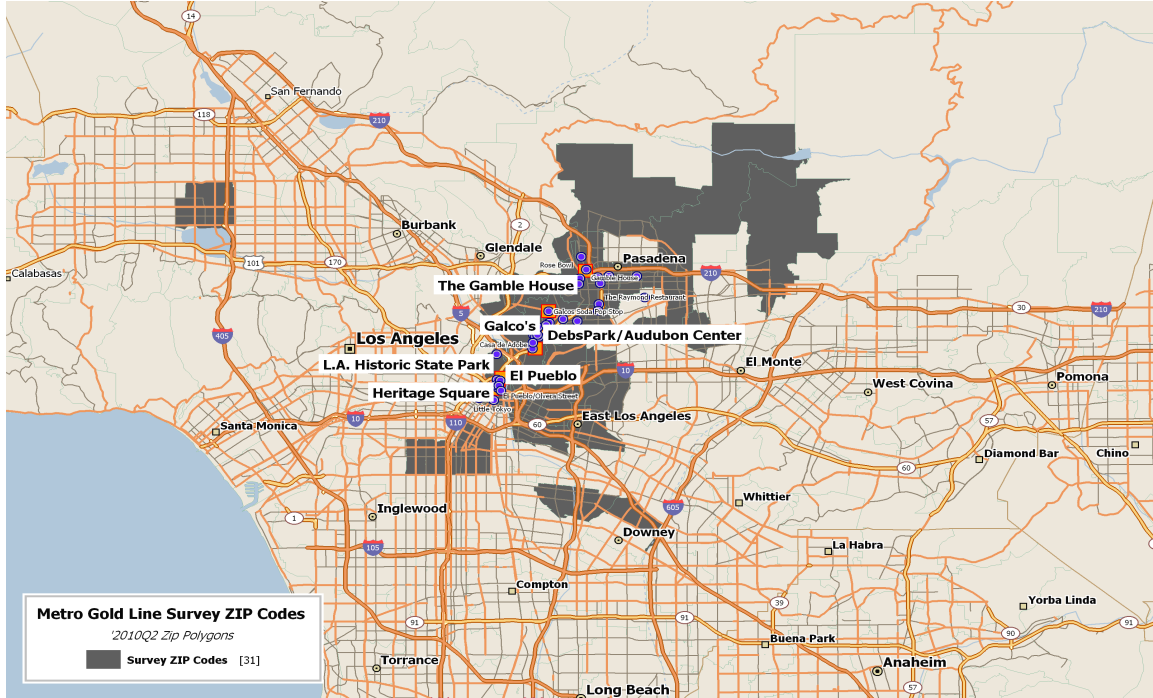


In the cluster of *regional* zip codes, the following Mosaic segments are dominant. Also listed are the respective number of households for each Mosaic segment.

Household Count in Secondary ZIP Codes (268 ZIP Codes; ~40 mi.)	Household count	Percentage of Households
Affluent Suburbia	556,669	14%
Upscale America	867,349	22%
Blue Collar Backbone	516,647	13%
Remote America	1,086	0%
Aspiring Contemporaries	740,081	19%
Total Top MOSAIC Groups in Secondary ZIP Codes	2,681,832	68%
Total Households in Secondary ZIP Codes	3,917,746	

## Metro Gold Line

The following map represents zip code areas where Metro Gold Line riders (surveyed in the Byway area) live. (96% of Gold Line riders surveyed in the Byway area live in Greater Los Angeles.)



The following table lists all Mosaic segments (and their relative presence), along with the number of households (by Mosaic segment) in the zip codes illustrated above.

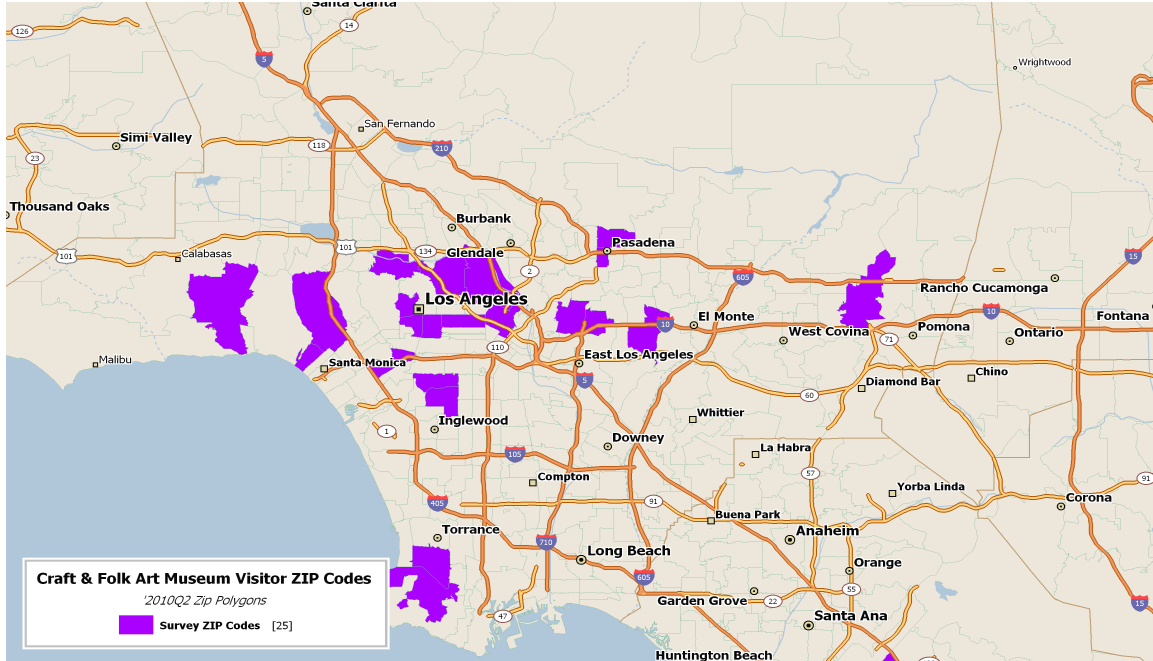
Metro Gold Line Riders Based on All Survey ZIP Codes	Household Counts	Percentage of Households
Affluent Suburbia	25,360	7%
<b>Upscale America</b>	<b>49,072</b>	<b>13%</b>
Small Town Contentment	19,626	5%
<b>Blue Collar Backbone</b>	<b>48,636</b>	<b>13%</b>
American Diversity	20,617	6%
Metro Fringe	7,727	2%
Remote America	55	0%
<b>Aspiring Contemporaries</b>	<b>47,833</b>	<b>13%</b>
Rural Villages & Farms	86	0%
<b>Struggling Societies</b>	<b>142,637</b>	<b>38%</b>
Urban Essence	11,850	3%
Varying Lifestyles	112	0%
Total Households in Survey ZIP Codes	373,611	100%

In the local area around the Gold Line (approx.. 20 miles), the following Mosaic segments are dominant. Also shown is the respective number of households for each Mosaic segment.

<b>Household Count in Local ZIP Codes (42 ZIP Codes; ~ 20 mi.)</b>	<b>Household count</b>	<b>Percentage of Households</b>
Upscale America	43,779	12%
Blue Collar Backbone	47,049	13%
Aspiring Contemporaries	45,817	13%
Struggling Societies	136,824	38%
Total Top MOSAIC Groups in Local ZIP Codes	273,469	77%
Total Households in Local ZIP Codes	356,071	

## Craft and Folk Art Museum

The following map represents Greater Los Angeles zip code areas where CAFAM visitors live. (70% of all CAFAM visitors live in Greater Los Angeles.)



The following table lists all Mosaic segments (and their relative presence), along with the number of households (by Mosaic segment) in the zip codes illustrated above.

Craft & Folk Art Museum Visitors Based on All Survey ZIP Codes	Household Counts	Percentage of Households
<b>Affluent Suburbia</b>	<b>63,130</b>	<b>18%</b>
<b>Upscale America</b>	<b>48,601</b>	<b>14%</b>
Small Town Contentment	12,385	3%
Blue Collar Backbone	28,052	8%
American Diversity	20,590	6%
Metro Fringe	7,268	2%
Remote America	-	0%
<b>Aspiring Contemporaries</b>	<b>137,560</b>	<b>38%</b>
Rural Villages & Farms	10	0%
Struggling Societies	29,842	8%
Urban Essence	11,783	3%
Varying Lifestyles	-	0%
Total Households in Survey ZIP Codes	359,221	100%

## Travel preferences: All respondents, and by survey site

Except as noted under “Visitor travel preferences and self-perceptions” in the memo above, differences in mean scores (tables below) were found not significant in differentiating the sites.

Rating scale: 1 = “Doesn't describe me at all”; 5 = “Describes me very well.”

<b>How well do the following statements describe you? (All respondents)</b>	<b>Mean Score</b>	<b>Std. Dev.</b>	<b>n</b>
I prefer to visit places that are well known and established.	3.23	1.259	398
I prefer to visit places that are somewhat off the beaten path and not very well known to most people.	3.92	1.168	400
I like to visit places that are considered "edgy" or "alternative" by most people.	3.55	1.277	390
<b>I prefer to visit places that are well known and established. (Score by site)</b>			
Metro Gold Line	3.78	1.121	60
El Pueblo	3.33	1.366	81
Heritage Square	3.22	1.124	37
Galco's Soda Pop Stop	3.22	1.404	51
Los Angeles State Historic Park	3.02	1.437	44
Debs Park/Audubon Center	2.97	1.257	31
Gamble House	2.95	1.061	40
Craft and Folk Art Museum	2.94	0.998	49
<b>I prefer to visit places that are somewhat off the beaten path and not very well known to most people. (by site)</b>			
Heritage Square	4.14	0.961	37
Debs Park/Audubon Center	4.06	1.076	31
Los Angeles State Historic Park	4.04	1.095	44
Galco's Soda Pop Stop	4.00	1.217	51
Gamble House	3.95	1.197	40
Craft and Folk Art Museum	3.92	1.152	49
El Pueblo	3.81	1.284	81
Metro Gold Line	3.70	1.212	60
<b>I prefer to visit places that are considered "edgy" or "alternative" by most people. (by site)</b>			
Heritage Square	3.76	1.116	37
El Pueblo	3.76	1.297	81
Metro Gold Line	3.67	1.142	60
Los Angeles State Historic Park	3.67	1.198	44
Galco's Soda Pop Stop	3.64	1.275	51
Craft and Folk Art Museum	3.52	1.329	49
Gamble House	3.13	1.453	40
Debs Park/Audubon Center	3.10	1.300	31

## Target ZIP Codes in which Aspiring Contemporaries Dominate

ZIP Codes Dominated by Aspiring Contemporaries				
#90008		#90747		
#90010		#90755		
#90016		#90802		
#90019		#90803		
#90025		#90804		
#90026		#90814		
#90027		#91001		
#90034		#91016		
#90035		#91020		
#90036		#91101		
#90038		#91106		
#90043		#91201		
#90046		#91203		
#90047		#91204		
#90048		#91205		
#90056		#91316		
#90066		#91324		
#90068		#91325		
#90069		#91367		
#90220		#91401		
#90230		#91403		
#90232		#91411		
#90249		#91423		
#90260		#91501		
#90291		#91502		
#90292		#91601		
#90293		#91602		
#90305		#91604		
#90403		#91607		
#90404		#91723		
#90501		#91801		
#90503		#92831		
#90746		#92868		